DOCUMENT RESUME

ED 201 042	EA 013 469

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TITLE	Information System: Analysis for the Peel Board of Education. Volume I: Description. Volume II: Technical Appendices.
SPONS AGENCY	Ontario Inst. for Studies in Education, Toronto.; Peel Board of Education, Mississauga (Ontario).
PUB DATE	Mar 77
NOTE	394p.
EDRS PRICE	MF01/PC16 Plus Postage.
DESCRIPTORS	Boards of Education; *Decision Making; Elementary Secondary Education; Foreign Countries; *Information Needs; *Management Information Systems; Planning; Principals; Superintendents
IDENTIFIERS	Ontario

ABSTRACT

Interviews with central office superintendents in the academic and business divisions, identification of user needs, and analysis of major management levels provided the data for designing an integrated information system for the Peel Board of Education in Ontario. A synthesis of the data into an overall framework representing the information structure of the Board relates user needs to information and its flow throughout the system. This framework identifies specific information requirements for the system as a whole, as well as key areas of information-utilization and information-generating activities. The study includes extensive technical appendices. (Author/WD)

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Vol. I

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INFORMATION SYSTEM: ANALYSIS FOR THE PEEL BOARD OF EDUCATION

Volume I: Description

Susan Padro

March 1977

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ACKNOWLEDGEMENT

The author would like to acknowledge the many participants in this project who contributed to its development and completion. The author is indebted to all the key officials and staff of the central office of the Peel Board of Education for their excellent cooperation, in spending many hours in intensive interviews describing and analyzing their job functions. Without their generous contribution of time and energy, the outputs of this project would not have been possible. The Peel members of the project Task Force (Murray Skinkle, Glen Whaley and Tim Costigan) were especially helpful in providing guidance to the project and in contributing their insights and knowledge about the system. As Liaison Officer, Mr. Skinkle proved particularly helpful in coordinating the activities between the Peel and O.I.S.E. project staff.

During the course of the project, the OISE membership on the project team varied. Special thanks are extended to two key staff members who made significant contributions to the project, but regretfully left prior to its completion: Ted Vangel, as co-principal investigator and Bryan Elwood. The OISE Research Officer on the project team, Derry O'Mahony, provided substantial inputs in all areas of the study, and especially in the development of the "synthesis" stage of the project. A final word of thanks goes to Mr. Tony Barone, an OISE student who took a special interest in the project and conducted the analysis for several management areas of the Peel Board with great success.

Finally, the author would like to acknowledge the funding support for the project made by the OISE Research & Development Office and by the Peel Board of Education. Without their generous support, this project could not have been possible.

INTRODUCTION

An information system is defined as a network of communication channels that acquires, processes, stores, retrieves and redistributes data for the individual and collective decision making process. The objective of a management information system is to provide timely, relevant, reliable and valid information upon which to base decisions.

OBJECTIVE AND SCOPE OF THE STUDY

It was the objective of this project to develop a general design for an integrated information system to support the managerial decisions and operational application areas at the central office level of the Peel Board of Education. Although the scope of the system is limited to central board functions, information to and from "external" bodies are dealt with as interfaces with the central board. These include flows of information between:

- school board administration and trustees
- school board administration and Ministry of Education
- school board administration and field offices
- school board administration and individual schools

Two foci have been defined for the systems study: the planning function and computer operations. Both these areas have as their terms of reference a broad scope which cuts across departmental boundaries and thus encompasses the entire range of board operations. This made them particularly suitable to aid in the orientation of the systems study as required in this project. In addition, at the time this study was undertaken, both the above departments were relatively newly-formed units at the board level, and it was expected that their role in the MIS study would aid in the definition and facilitation of their operations.

APPROACH OF THE STUDY

The design of the Management Information System, as conceived in this project, is based on user needs rather than the traditional computer-oriented approach of MIS. This means that the systems design is based on the information needs of the users rather than on the hardware constraints of the computer. The computer is considered one component of the over-all system, in conjunction with other media for storage, processing and retrieval, including the manual component. This ensures that information areas which cannot be efficiently or effectively handled by the computer are not overlooked. The result is a total, integrated system which best serves the information requirements of the Board's decision makers.

Given the frame of reference of the study, a major component was the identification of the "users" of the MIS and determination of their information needs, as related to their management functions.

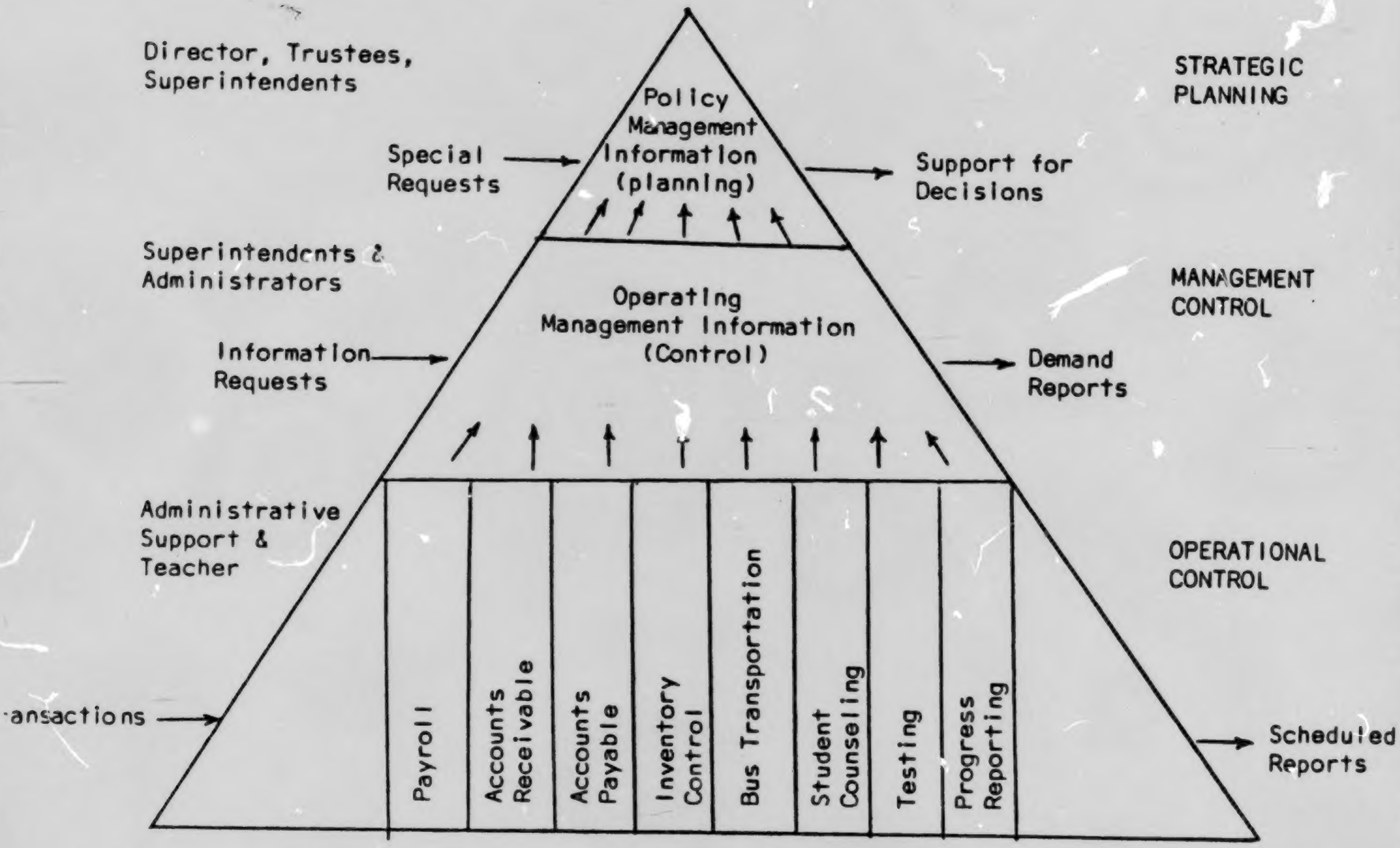
Operationally, this included: (a) the definition of the major management areas with personnel responsible for them; (b) analysis of the processes in each area; (c) determination of relevant information requirements; (d) identification of source data and timing required to produce the information; and (e) analysis of information flows between the major management areas.

Given the above analysis, the data base can be designed and maintained in such a way as to satisfy user requirements in the most efficient and effective manner, utilizing any combination of media (including the computer) available to the Board.

Since this approach maintains the importance of information as supportive of the decision-making processes of the Board, the general conceptual framework upon which it is based is one which relates information to levels of decision-making, as in Figure 1. Three levels of management decisions are shown to be supported by the MIS: operational control, management (tactical) control and strategic planning. Operational control relates to the daily routine transactions of the system--purchasing, payroll, inventory control, etc. Management control is concerned with short-range questions of policy implementation. Strategic planning addresses itself to problems of policy-setting and long-range planning. The MIS design incorporates the information required for these three categories of decisions. The distinction between these types of information is useful because each involves different methods of generation, transformation and presentation. Strictly computer-oriented information systems usually

Figure 1

Management Levels and Information Flow


Director, Trustees,
Superintendents
STRATEGIC
PLANNING
Policy
Management
Information
(planning)
Special
Requests
Support for
Decisions
Superintendents &
Administrators
MANAGEMENT
CONTROL
Operating
Management Information
(Control)
Information
Requests
Demand
Reports
Administrative
Support &
Teacher
OPERATIONAL
CONTROL
-ansactions
Payroll
Accounts
Receivable
Accounts
Payable
Inventory
Control
Bus Transportation
Student
Counseling
Testing
Progress
Reporting
Scheduled
Reports

are geared to the production of information for operational and tactical control; they tend to ignore information at the strategic planning level. The orientation of this study is to take all the necessary types of information into account.

To ensure that the user's perspective was maintained throughout, a Task Force was established as the working unit of the project, consisting of both OISE and PEEL personnel, as follows:*

PEEL:	Mr. Murray Skinkle - Liaison Officer
	Mr. Tim Costigan
	Mr. Glen Whaley
OISE:	Dr. Susan Padro - Principal Investigator
	Mr. Ted Vangel
	Mr. Bryan Elwood

The role of this Task Force was to define the system's objectives, scope and specifications, and to provide guidance and monitoring of the general direction of the project. Responsibilities of the Task Force members were divided such that the Peel Board component provided guidance for the general direction of the project and initiated the contacts with Board personnel while the OISE members provided the technical expertise and the staff for the detailed interviews with Board officials.

The Task Force approach has proved successful in allowing for a close working liaison with Board officials, especially in the intensive personnel-oriented first stages of the study, as well as providing insights into the operating areas of the Board with their constraints and priorities. This approach has been extremely useful in ensuring the relevance of the project to the needs of the Board and in establishing the confidence and close working relationship with the Board's personnel essential to the success of the study.

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*Some of the personnel listed were not on the project for its entire duration. Dramatic changes occurred in the OISE group, which lost Mr. Vangel and Mr. Elwood in the winter of 1976.

It must be pointed out that the Task Force members, as defined above, were not the only people with major involvement in the project. All the key officials of the Board and many of their top-level staff contributed heavily to the analysis of their specific management areas. This involvement is reflected in the volume of materials presented in the analyses of the major management areas in Volume II of this report. The OISE Task Force component was augmented by Mr. Tony Barone, a student in the department of Educational Planning and Mr. Derry O'Mahony a Research Officer at OISE. Both contributed significantly to the analysis presented in the study.

SUMMARY OF OUTCOMES

The outcomes of the study can be summarized as follows:

1. Systems analysis of the Board's operations. For each of the major management areas there is detailed analysis of its components with flowcharts of these activities, and their relationship to other major Board functions.
2. Need analysis for information system design. Information needs of the major management areas are defined in terms of user requirements, reports and data sources.

3. Synthesis of the information structure of the Board. This is presented in terms of an integrated overview of Board functions related to the pattern of information flows, levels of decision-making and clusters of information.
4. Recommendations for system implementation. Outline of further steps required for operational system design and implementation.

PROCEDURES AND OUTPUTS

A. Initialization

The initialization stage of the project consisted of the determination of the scope and approach of the project, Task Force designation and review of general operations of the system.

The boundary of the system under study was defined as the operations of the central board office. Functions external to it were to be included only in terms of their interface with that office.

At this stage of the project, the specific roles and responsibilities of the Task Force members were defined. The role of the Peel Board members of the Task Force was to provide their insights, understanding and knowledge of the system, to act as a liaison between the study team and Board personnel and to facilitate and actively participate in some of the critical stages of the study, especially those involving initial contacts with key board officials.

The OISE personnel contributed their technical expertise in the analysis and synthesis of the systems study. At the time that the study was initiated, the board had just completed a total change in organizational structure. It was necessary, at this initial stage of the project, for the OISE members of the Task Force to familiarize themselves with this new structure, as well as with the program areas and functions of the board. For this purpose, a general review of the system's operations was carried out.

This consisted of a series of interviews conducted by the OISE project staff with each of the Superintendents at the central office level in both the Academic and Business divisions. Appendix A presents the results of these interviews by Board department. In addition to providing the project team with information about the operations of the Board, these interviews also provided the key officials with the opportunity to acquaint themselves with the nature of the study and the OISE project staff.

B. Analysis: Procedures

In order to fulfill the objectives of the study, it was necessary to determine what information was actually required for activities and operations in the Board's decision-making processes and the channels through which information flowed within the organization. To identify these, user needs were defined in terms of major management areas of the Board office. A detailed analysis of these functions was conducted via a two-stage process: first and second level activity analyses.

Establishment of User Needs:

User needs were defined by the Task Force members in terms of twelve major management areas of the central office of the Board. It was agreed that these areas defined the major activities of the Board, and would form the basis for the Information System design. Table 1 provides a list of these major management areas. It must be noted

TABLE 1: INFORMATION SYSTEM/PEEL COUNTY SCHOOL BOARD: MAJOR MANAGEMENT AREAS

1.	Budget Process:	1.1	Preparation
		1.2	Control
2.	Accounting Function:	2.1	Accounts Payable
		2.2	Accounts Receivable
		2.3	General Accounting
		2.4	Payroll
3.	Supply Function:	3.1	Purchasing
		3.2	Stores/Inventory
		3.3	Printing Services
4.	Accommodation Supply:	4.1	Capital Projects
		4.2	Facilities Inventory
5.	Plant Operations & Maintenance:	5.1	Operations
		5.2	Maintenance
6.	Transportation:		
7.	Personnel Administration:	7.1	Salary Administration
			- Job Evaluation/Description
			- Payroll
			- Benefits
		7.2	Personnel Allocation
8.	Staff Development & Relations:	8.1	Development
		8.2	Relations
		8.3	Evaluation
			- Academic
			- Non-academic
9.	School Curriculum (Program):	9.1	Development & Evaluation
		9.2	Operations
10.	Special Student Services:	10.1	Special Education
		10.2	Attendance
		10.3	Psychological Services
11.	Continuing Education:		
12.	External Relations:	12.1	Ministry Reports:
			June Board Report
			Financial Report
		12.2	September School Report

that these areas do not necessarily reflect departmental units within the system, but rather define management functions, many of which may cut across budgetary boundaries.

This was considered the most useful approach for the information system analysis, since it would prove to be more flexible in the face of organizational changes as a consistent set of functions which would have to be carried out regardless of where they were actually "housed". From the point of view of the information system, it is these functional areas which have greatest impact on the information structure of the system.

Analysis of the Major Management Areas: First Level

The first level of analysis of the major management areas was designed to provide an overall understanding of the operations of each management area. This analysis included a breakdown of each area into its main component parts, with associated inputs, outputs and key personnel identified.

Many of the initial interviews to collect the data required at this stage were conducted by the Peel members of the Task Force, using a standardized data sheet. This approach was successful in introducing key board officials to the details of the study, and in gaining their commitment to it. Due to the time constraints of overburdened key Board officials, OISE staff conducted a series of concentrated follow-up interviews to complete this stage of the study. The preliminary outcomes of these interviews for each major management area were then validated by the officials involved. These activity analysis sheets were then used to develop flowcharts of the main processes in each major management area. These too were validated and updated by the relevant staff members. The finalized activity analysis documents are presented in Appendix B, and the flowcharts in Appendix C.

Analysis of Major Management Areas: Second Level

This level of analysis followed the first level interviews, providing a detailed description of each component of the major management areas. This included specific sequences of activities, timing, personnel, information requirements and associated data sources. These intensive interviews were rather technical in nature, and thus were conducted primarily by the OISE staff with assistance from the Peel Board members of the Task Force where necessary.

Flowcharts of these detailed processes were prepared from the interview data sheets and from follow-up discussions for clarification of the flows, where necessary. In some cases, flowcharts were prepared directly at the interviews, omitting the intermediate stage of completion of the detailed activity description forms. Both the detailed activity analysis documents and flowcharts were validated by the personnel responsible for the respective areas. Appendix B presents all the activity analysis documents--both for the first and second level analyses. Appendix C provides the flowcharts relating to the total set of activities as defined in the activity analysis documents.

C. Analysis: Outputs

To illustrate the type of outputs produced by the first and second level analyses, this section will present the major management area of the "Budget Process" as an example. This area is divided into two components: preparation and control. The "Budget Preparation" area is used in this example. For the first level analysis, the Superintendent of Administrative Services was interviewed and, as a result, the overview form presented in Table 2 was completed. This lists the major set of steps involved in the budget preparation process, along with the main inputs, outputs and participants. Using this document as a basis, a flowchart of the overall process was drawn, as illustrated in Figure 2. This flowchart illustrates in further detail the general flows of documents and information in the steps of budget preparation.

The second level analysis consisted of detailed analyses of each step in the process, as outlined in the first level analysis. To illustrate this, step 2 in the overview document (Table 2) has been selected: "Prepare school requests". Table 3 presents the breakdown of the activities involved in the preparation of school budgetary requests from the Field Office. Ten steps are listed in the process, along with their inputs and outputs. Input is defined as the information necessary to carry out the step. The source of the input information is noted on the document. On the output side, not only information, but actions or consequences of the step are itemized, along with their timing. The personnel with major responsibility for each step in

TABLE 2 **OVERVIEW**

MANAGEMENT AREA: BUDGET PREPARATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Prepare budget guidelines	1. Budget format 2. Expenditures - current year to-date 3. Budget - current year	1. Budget Guidelines -forms -instructions -expenditure summary (current year)	Supt. of Finance
2	Prepare school requests	1. Cap-current requests 2. Special requests 3. Mtce. requests	1. School requests	School staff
3(a)	Prepare Area Requests, priority rank	1. School requests 2. "Overheads" 3. Budget Guidelines 4. Consultation - Finance	1. Area requests 2. Requests to Departments	Superintendents - Families
3(b)	Prepare Department requests, priority rank	1. Program requests - Dept. 2. Program requests - areas 3. "Overheads" 4. Budget Guidelines 5. Consultation - Finance	1. Department requests (Forms BD-1, 1(a), 2(a))	Department Heads
4	Prepare Superintendency Requests, priority rank	1. Area requests 2. Department requests 3. "Overheads" 4. Budget Guidelines 5. Consultation - Finance	1. Superintendent requests (Form BD-2)	Superintendents
5.	Total Budget Compilation	1. Superintendent Requests 2. Dept. and Area Requests	1. Budget Request	Superintendent of Finance
6	Budget Review - Internal (adjust, revise)	1. Budget Request 2. Consultation - Supts., Dept. Heads 3. Revenue Estimates 4. Ceiling Calculations	1. Revised Budget Request (approved in principle)	Admin. Council
7	Budget Review - F & B Comm. (Adjust, revise)	1. Revised Budget Request 2. Revenue Estimates 3. Ceiling Calculations 4. Consultation - Supts.	1. Final Budget Request	F & B Committee
8	Budget Approval	1. Final Budget Request	1. Approval Budget	Board

FIGURE 2

1.1 BUDGET PREPARATION

1 of 2

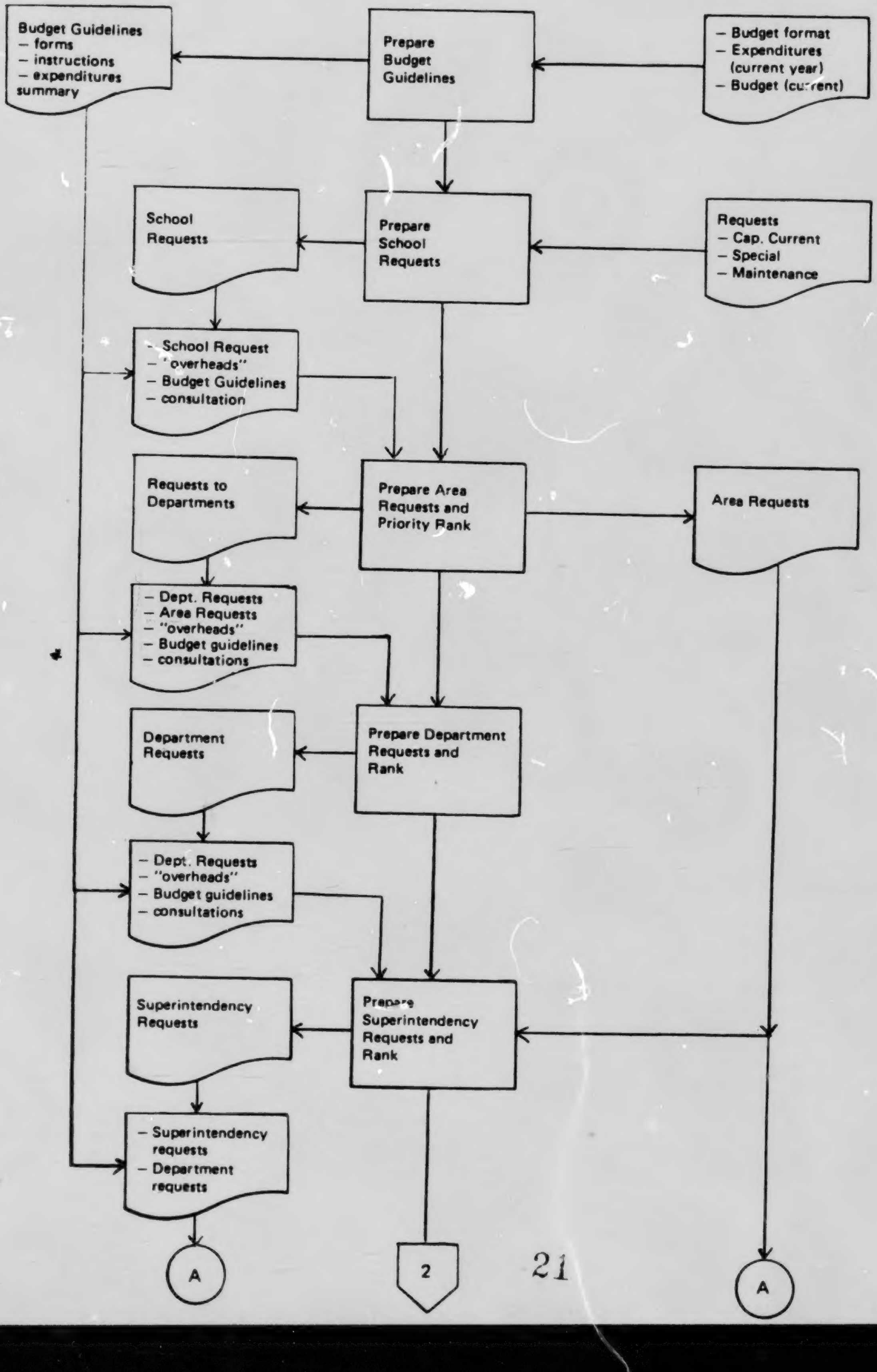
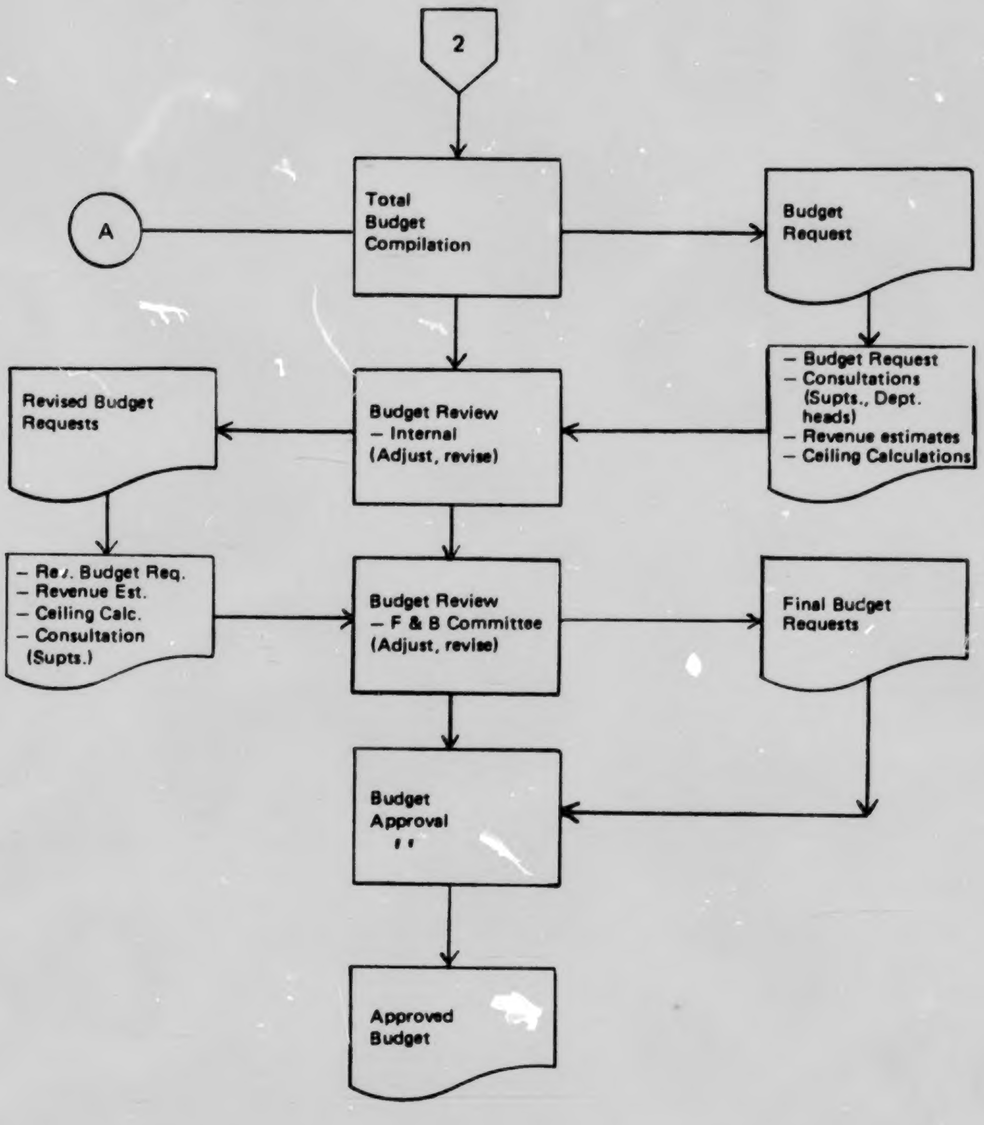

Budget Guidelines
– forms
– instructions
– expenditures summary
Prepare Budget Guidelines
– Budget format
– Expenditures (current year)
– Budget (current)
School Requests
Prepare School Requests
Requests
– Cap. Current
– Special
– Maintenance
– School Request
– "overheads"
– Budget Guidelines
– consultation
Requests to Departments
Prepare Area Requests and Priority Rank
Area Requests
– Dept. Requests
– Area Requests
– "overheads"
– Budget guidelines
– consultations
Department Requests
Prepare Department Requests and Rank
– Dept. Requests
– "overheads"
– Budget guidelines
– consultations
Superintendency Requests
Prepare Superintendency Requests and Rank
– Superintendency requests
– Department requests
A
2
A

FIGURE 2

1.1 (cont'd)

2 of 2


2
A
Total Budget Compilation
Budget Request
– Budget Request
– Consultations (Supts., Dept. heads)
– Revenue estimates
– Ceiling Calculations
Revised Budget Requests
Budget Review – Internal (Adjust, revise)
– Rev. Budget Req.
– Revenue Est.
– Ceiling Calc.
– Consultation (Supts.)
Budget Review – F & B Committee (Adjust, revise)
Final Budget Requests
Budget Approval
Approved Budget

the process are also listed on this document. Figure 3 presents a flowchart based on this detailed activity analysis. Again, the flowchart allows for easier understanding of the flows of information with respect to the activities in the process.

It is not expected that all these documents and flowcharts would be of equal use to all Board officials. Those who head departments or have primary responsibility for an entire major management area would be most interested in the overview of their sphere of operations, and would study the detailed analyses only as required. Similarly, those who are responsible for a specific component of a major management area would receive greatest use from the detailed analysis of that component, with the overview analysis aiding in the understanding of how that component links to the others in that area.

The overview and detailed activity analysis documents have been compiled by major management area in Appendix B, while all the flowcharts (general and detailed) are presented in Appendix C. The rationale for separating the documents from the flowcharts is that one would expect these to be utilized by different groups of people. The activity analysis documents are easily readable and can be understood equally by technical and non-technical personnel. The flowcharts on the other hand, would probably be most useful as inputs to technical staff in the computer operations area.

TABLE 3

DETAILED PROCEDURE ANALYSIS

AREA: 1.1.2.1 BUDGET PREPARATION **COMPONENT:** SCHOOL REQUESTS FROM FIELD OFFICE

OBJECTIVES: 1.

2.

3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Prepare description of Budget Categories and Instructions	Previous Budget Documents Directives from Central Office		Description documents	Oct.	Field Supt.
(a)	Set upper limit on cap. current and replacements	Board per pupil and allocation policy	Planning Budget	Part of Description Document	Oct.	Field Supt.
		Enrollments (current	Schools			
		Conditions & Needs of Individual Schools	Schools			
2	Cap. Current & Replacement and Supplemental Budget prepared by schools	Description Document		Requests + % of allocable to non-allocable of Cap. Currents (Purchase Requisition Form)	A.N.A. after Jan.	School Principal
3	Meeting of Field Supt. with Principals for clarification, etc.				Oct. (ca. 1 week after description sent out)	

TABLE 3

DETAILED PROCEDURE ANALYSIS

AREA: 1.1.2.1 BUDGET PREPARATION (Cont'd) **COMPONENT:** SCHOOL REQUESTS FROM FIELD OFFICE

OBJECTIVES: 1.

2.

3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
4	Requests from school generated at any time and reviewed by Supt. or designate (Admin. Assist.) (upto 50%)	Request from school Upper limits Educational relevance to program	School; Field Office Allocations. School & Field Office	Requisition	A.N.A.	School and
4(a)	Non-allocable requests--to Construction Dept.	" " + Rationale for need		Request for Estimate to Construction Department	4 Mons. lead-time	
4(b)	Major Requests to Supt. of Plant	+ Rationale for need				
5	Requests over 50% and Supplemental held until Budget Approval		Field Office			
6	Consider Requests over 50% of Budget--Approved Subject to Board Approval	Budget Approval by Board	Board	Requisitions out automatically	A.N.A. Following Budget Approval by Board (Spring)	
6(a)	Consider Supplemental Requests	Budget Approval by Board Budget Balance (imcommitted)	Board Field Supt.	Requsiitions for Approval items	Following Budget Approval by Board (Fall)	

FIGURE 3

1.1.2.1 BUDGET PREPARATION: School Requests From Field Office

1 of 2

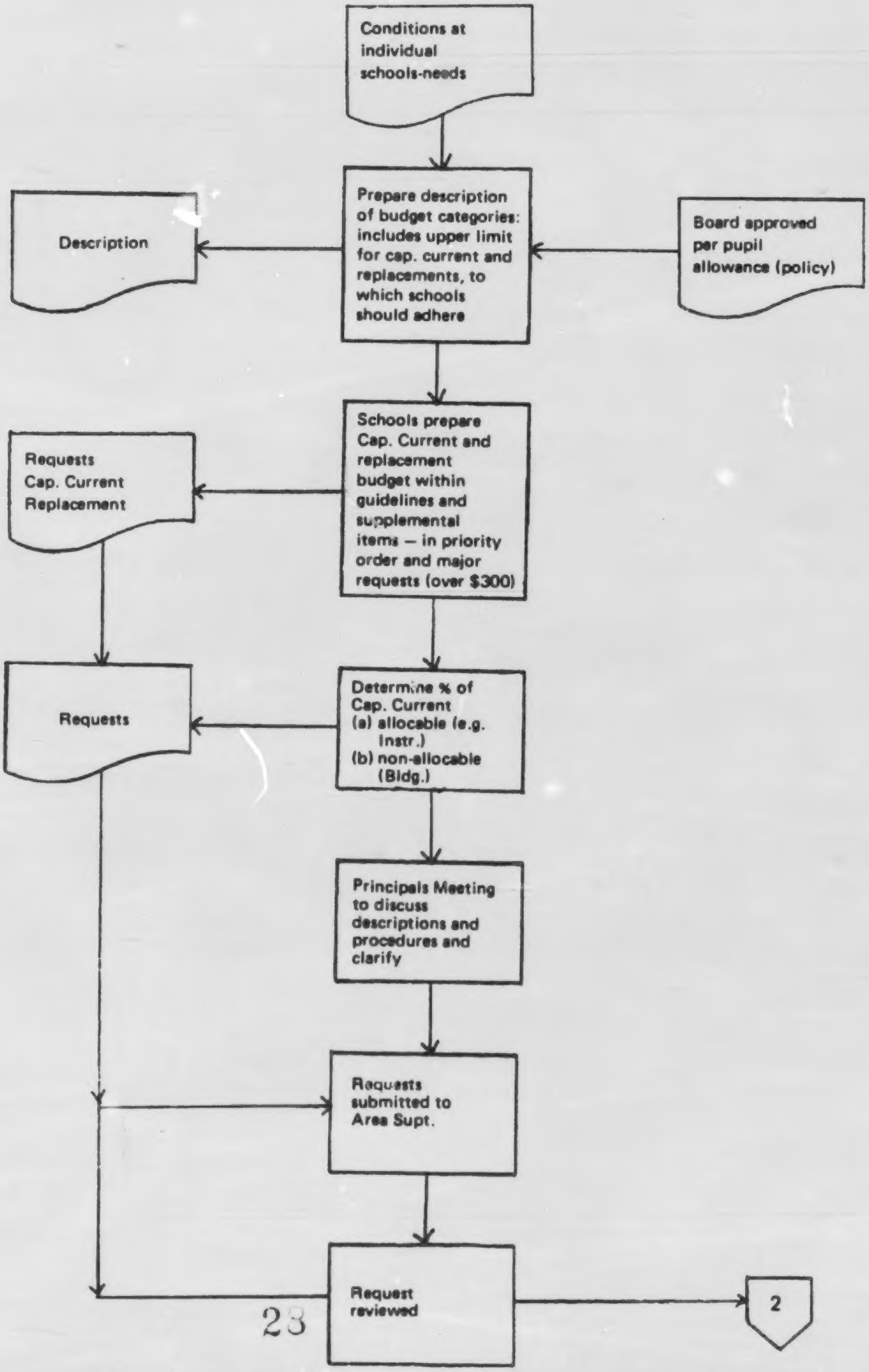
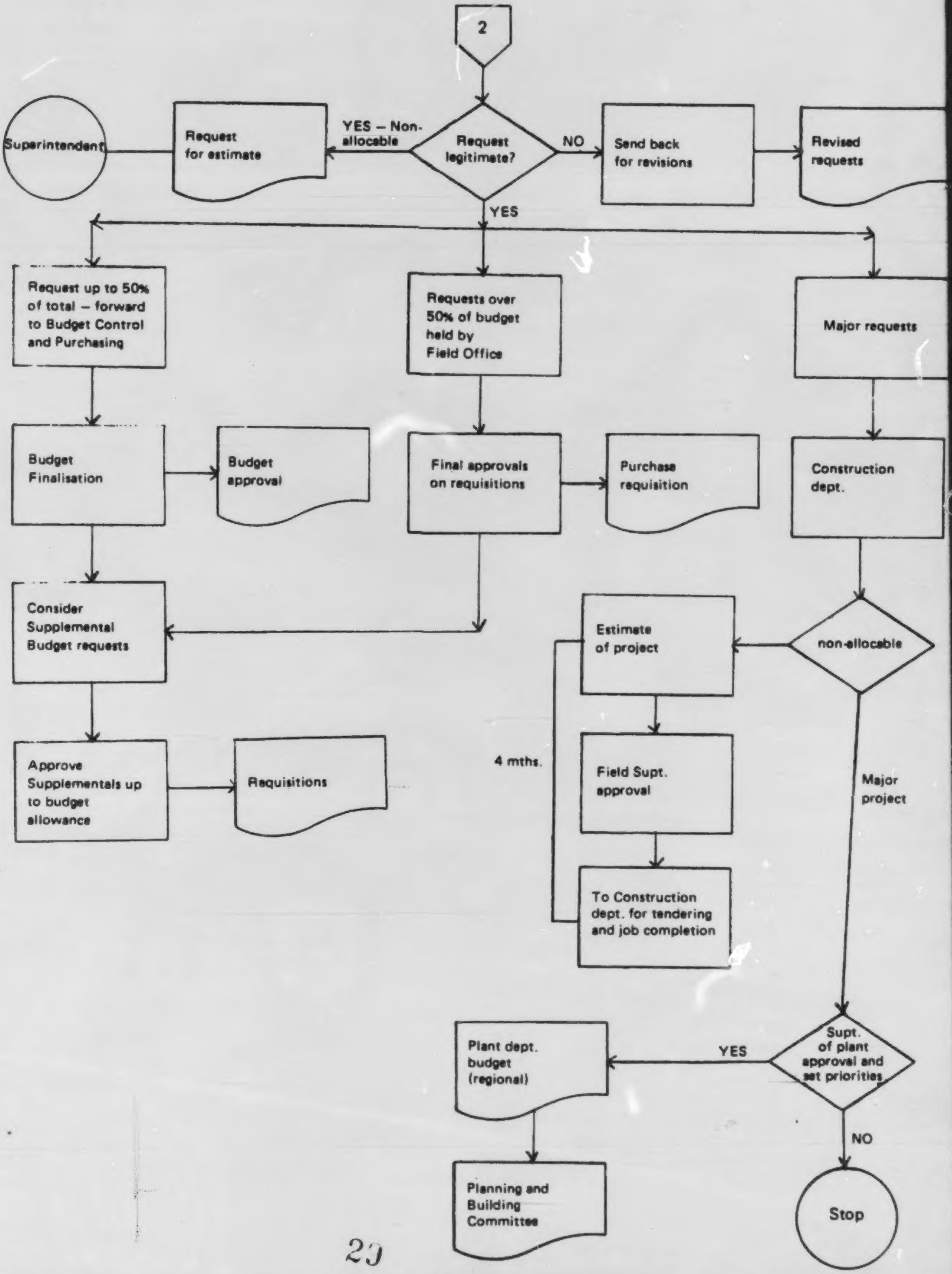

Conditions at individual schools-needs
Prepare description of budget categories: includes upper limit for cap. current and replacements, to which schools should adhere
Description
Board approved per pupil allowance (policy)
Schools prepare Cap. Current and replacement budget within guidelines and supplemental items — in priority order and major requests (over $300)
Requests Cap. Current Replacement
Determine % of Cap. Current (a) allocable (e.g. Instr.) (b) non-allocable (Bldg.)
Requests
Principals Meeting to discuss descriptions and procedures and clarify
Requests submitted to Area Supt.
Request reviewed
2

FIGURE 3

1.1.2.1 (cont'd)

2 of 2


2
Request legitimate?
YES – Non-allocable
Request for estimate
Superintendent
NO
Send back for revisions
Revised requests
YES
Request up to 50% of total – forward to Budget Control and Purchasing
Requests over 50% of budget held by Field Office
Major requests
Budget Finalisation
Budget approval
Final approvals on requisitions
Purchase requisition
Construction dept.
Consider Supplemental Budget requests
Estimate of project
non-allocable
Approve Supplementals up to budget allowance
Requisitions
4 mths.
Field Supt. approval
Major project
To Construction dept. for tendering and job completion
Supt. of plant approval and set priorities
YES
Plant dept. budget (regional)
NO
Planning and Building Committee
Stop

D. Synthesis: Information Structure

The completion of the activity analyses provided a detailed systems study of the organization in terms of major management areas. The next step was to synthesize the disaggregated data into an overall framework representing the information structure of the Board. This consisted of the development of the flowchart presented in Figure 4. Here, information sources and destinations, external to the management process are distributed around the circumference of a circle, and are arranged according to the following scheme (reading clockwise around the circle from centre left).

(a) Agencies generating Demand for school board services and resources, i.e., the clients of the board.

- The local community, Adult, special and regular students.

(b) Agencies generating the Supply of services and resources to meet the needs of school board clients.

These are - the Provincial program and financial resource agencies;
- the board teaching and support staff;
- the suppliers of goods and services from outside the school system.

The three levels of decision-making are represented by the three main concentric circles in the diagram: the outer circle represents operations and operational control, the middle one management (tactical) control and the central core houses activities concerned with strategic planning. At the centre of system is the area of "Board

Direction & Approval". The main components of the major management areas have been placed on the diagram (in bubbles) at decision levels most representative of their major functions, with some overlapping two areas as necessary. Thus, the management areas which can be classified under the "planning" level of decisions include budget preparation, accommodation supply, school curriculum (planning and evaluation), a portion of contract negotiations and of special student services. At the "management control" level are management areas such as general accounting (capital), budget control, personnel allocation, timetabling and grade reporting, transportation and so on. It is clear that most of the management areas fall within the category of "operations and operational control". These include most of the accounting functions, external relations, staff development functions, some areas of special student services, some activities in transportation, plant operations and maintenance, supplies and so on. The arrows indicate flows of information between the management areas themselves and also between the management areas and the main information clusters within the board. These latter are indicated in the diagram by rectangles. Flows of information are also noted between the board office and agencies external to it, both within the jurisdiction of the Board (e.g., area offices, schools, teachers) and those external to it (e.g., other Boards, Ministry of Education, etc.).

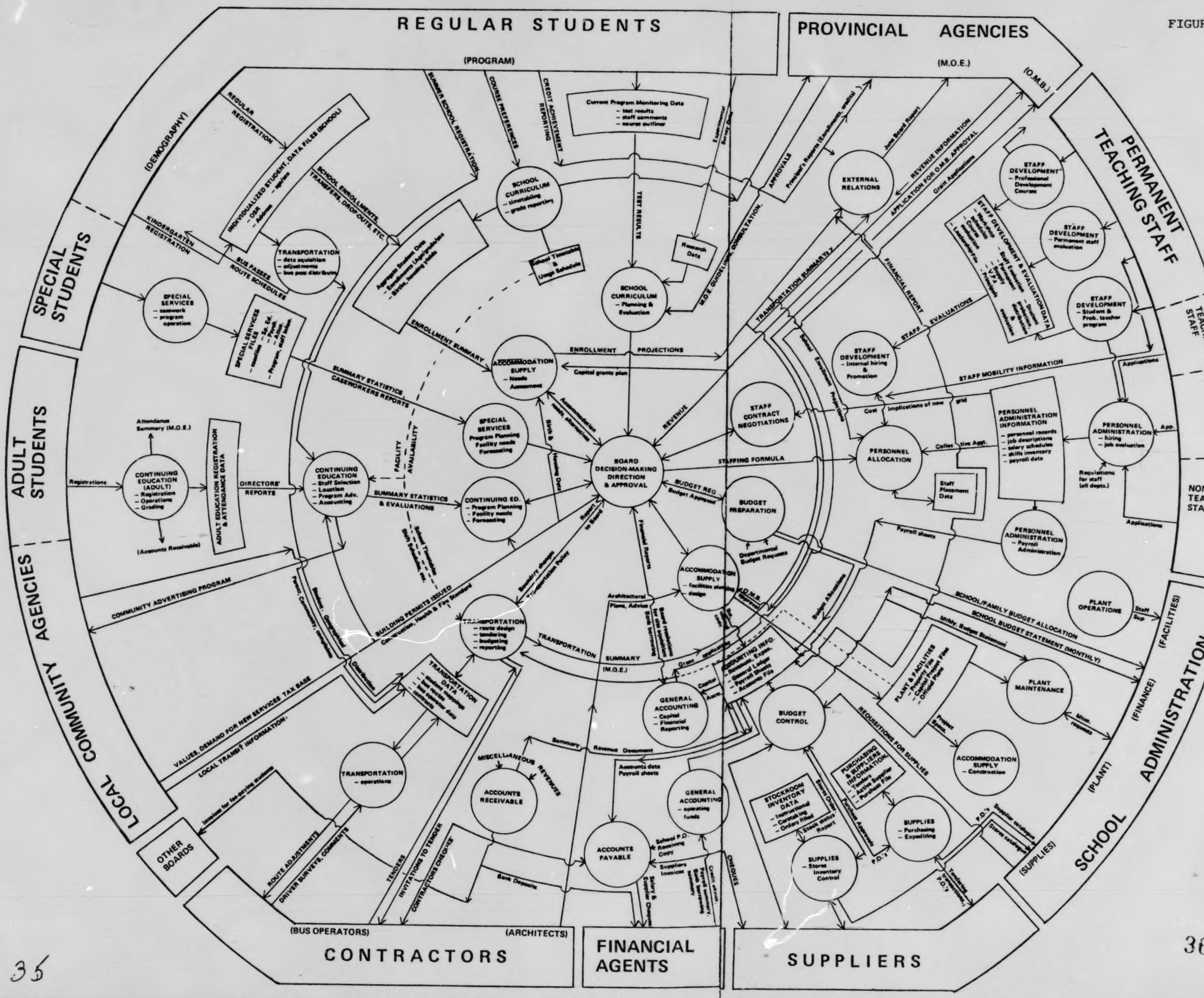
The synthesis provides the general design of the Board's information structure. It relates user needs to information and its flows throughout the system. It is from this frame of reference that specific information requirements can be defined for the system as a whole.

Table 4 summarizes the relationship between the management areas and clusters of information as defined on Figure 4, in terms of the principal sources of information used by each area. Locations in the table marked with an asterisk denote a potentially useful information source not currently used by the management area indicated. Table 4 provides, along with the synthesized flowchart, the basis for the specific design of data files for the information system.

TABLE 4: INFORMATION SOURCE MATRIX

	Information Categories															
Management Areas	Personnel Admin.	Staff Placement	Staff Development & Evaluation	Accounting Files: (a) Payroll	(b) Other	Stockroom Inventory	Purchasing & Suppliers Files	Plant & Facilities Files	Transportation Data	Continuing Education Registration Data	Special Services Files	Decentralized, Individualized Student Files (e.g. OSR)	Aggregate Student Enrollment, Distribution & Scheduling Files	Current Program Monitoring & Evaluation	Timetables, Schedules	Departmental/ Field/School Office Files
1.0 BUDGET PROCESS:																
1.1 Preparation					X				X	X						X
1.2 Control						X	X									X
2.0 ACCOUNTING FUNCTIONS:																
2.1 Accounts Payable					X											
2.2 Accounts Receivable					X							X				X
2.3 General Accounting					X			X								
2.4 Payroll Distribution				X												
3.0 SUPPLY FUNCTION:																
3.1 Purchasing					X		X									X
3.2 Stores						X										X
4.0 ACCOMMODATION SUPPLY: Capital Projects								X					X			X
5.0 PLANT OPERATIONS & MAINTENANCE:																
5.1 Operations					X	X	X									X
5.2 Maintenance					X			X								X
6.0 TRANSPORTATION:									X		X	X			*	X
7.0 PERSONNEL:																
7.1 Administration	X			X												X
7.2 Allocation	X	X	X										X			X
8.0 STAFF DEVELOPMENT & RELATIONS:																
8.1 Development			X													X
8.2 Relations	X	X	X													X
8.3 Evaluation	X		X													X
9.0 SCHOOL CURRICULUM:																
9.1 Prog. Devel. & Eval.														X		X
9.2 Operations		X						*						X	X	X
10.0 SPECIAL STUDENT SERVICES:																
10.1 Special Education		X	X								X	X				X
10.2 Attendance											X	X				X
10.3 Psych. Services											X	X				X
11.0 CONTINUING EDUCATION:																
11.1 Adult	*		X		X			*		X					*	X
11.2 Summer School			X					*		X			*	X	*	X
11.3 Other										X						X
12.0 EXTERNAL RELATIONS:																
June Board Report		X		X	X			X			X		X			X
Financial Report					X								X			X
Sept. School Report		X	X									X	X	X	X	X

FIGURE 4


REGULAR STUDENTS
(PROGRAM)
PROVINCIAL AGENCIES
(M.O.E.)
(O.M.B.)
PERMANENT TEACHING STAFF
TEMPORARY TEACHING STAFF
POTENTIAL STAFF
NON-TEACHING STAFF
SCHOOL ADMINISTRATION
(FACILITIES)
(FINANCE)
(PLANT)
(SUPPLIES)
SUPPLIERS
FINANCIAL AGENTS
CONTRACTORS
(BUS OPERATORS)
(ARCHITECTS)
OTHER BOARDS
LOCAL COMMUNITY AGENCIES
ADULT STUDENTS
SPECIAL STUDENTS
(DEMOGRAPHY)
BOARD DECISION-MAKING DIRECTION & APPROVAL
SCHOOL CURRICULUM - timetabling - grade reporting
SCHOOL CURRICULUM - Planning & Evaluation
Current Program Monitoring Data - test results - staff comments - course outlines
INDIVIDUALIZED STUDENT DATA FILES (SCHOOL)
TRANSPORTATION - data acquisition - adjustments - bus pass distribution
SPECIAL SERVICES - casework - program operation
SPECIAL SERVICES FILES
ACCOMMODATION SUPPLY - Needs Assessment
SPECIAL SERVICES Program Planning Facility needs Forecasting
CONTINUING EDUCATION (ADULT) - Registration - Operations - Grading
ADULT EDUCATION REGISTRATION & ATTENDANCE DATA
CONTINUING EDUCATION - Staff Selection - Location - Program Adv. - Accounting
CONTINUING ED. - Program Planning - Facility needs - Forecasting
TRANSPORTATION - route design - tendering - budgeting - reporting
TRANSPORTATION DATA
TRANSPORTATION - operations
ACCOUNTS RECEIVABLE
ACCOUNTS PAYABLE
GENERAL ACCOUNTING - Capital - Financial Reporting
GENERAL ACCOUNTING - operating funds
ACCOUNTING INFO.
ACCOMMODATION SUPPLY - facilities planning - design
BUDGET PREPARATION
BUDGET CONTROL
STAFF CONTRACT NEGOTIATIONS
EXTERNAL RELATIONS
STAFF DEVELOPMENT - Professional Development Courses
STAFF DEVELOPMENT - Permanent staff evaluation
STAFF DEVELOPMENT - Student & Prob. teacher program
STAFF DEVELOPMENT - Internal hiring & Promotion
STAFF DEVELOPMENT & EVALUATION DATA
PERSONNEL ADMINISTRATION INFORMATION - personnel records - job descriptions - salary schedules - skills inventory - payroll data
PERSONNEL ADMINISTRATION - hiring - job evaluation
PERSONNEL ALLOCATION
Staff Placement Data
PERSONNEL ADMINISTRATION - Payroll Administration
PLANT OPERATIONS
PLANT MAINTENANCE
PLANT & FACILITIES
ACCOMMODATION SUPPLY - Construction
STOCKROOM INVENTORY DATA
PURCHASING & SUPPLIERS INFORMATION
SUPPLIES - Purchasing - Expediting
SUPPLIES - Stores Inventory Control
Research Data
School Timetables & Usage Schedules
REGULAR REGISTRATION
KINDERGARTEN REGISTRATION
BUS PASSES
ROUTE SCHEDULES
SCHOOL ENROLLMENTS, TRANSFERS, DROPOUTS, ETC.
SUMMER SCHOOL REGISTRATION
COURSE PREFERENCES
CREDIT ACHIEVEMENT REPORTING
TEST RESULTS
ENROLLMENT SUMMARY
ENROLLMENT PROJECTIONS
Capital grants plan
SUMMARY STATISTICS
CASEWORKERS REPORTS
FACILITY AVAILABILITY
Registrations
Attendance Summary (M.O.E.)
(Accounts Receivable)
DIRECTORS' REPORTS
SUMMARY STATISTICS & EVALUATIONS
COMMUNITY ADVERTISING PROGRAM
BUILDING PERMITS ISSUED
Construction, Health & Fire Standard
VALUES, DEMAND FOR NEW SERVICES TAX BASE
LOCAL TRANSIT INFORMATION
Invoices for fee-paying students
ROUTE ADJUSTMENTS
DRIVER SURVEYS, COMMENTS
TENDERS
INVITATIONS TO TENDER
CONTRACTORS CHEQUES
Bank Deposits
MISCELLANEOUS REVENUES
Summary Revenue Document
Accounts data Payroll sheets
School P.O. Receiving Copy
Suppliers Invoices
Salary & Supplier Cheques
CHEQUES
TRANSPORTATION SUMMARY (M.O.E.)
Architectural Plans, Advice
REVENUE
STAFFING FORMULA
BUDGET REQ.
Budget Approval
Departmental Budget Requests
Financial Reports
APPROVALS
Principal's Reports (Enrollments, grades)
June Board Report
REVENUE INFORMATION
APPLICATION FOR O.M.B. APPROVAL
Grant Applications
M.O.E. GUIDELINES, CONSULTATION
TRANSPORTATION SUMMARY
FINANCIAL REPORT
STAFF EVALUATIONS
School Enrollment Projections
STAFF MOBILITY INFORMATION
Cost implications of new grid
Collective Agmt.
Applications
App.
Requisitions for staff (all depts.)
Payroll sheets
SCHOOL/FAMILY BUDGET ALLOCATION
SCHOOL BUDGET STATEMENT (MONTHLY)
Mthly. Budget Statement
REQUISITIONS FOR SUPPLIES
Project Specs.
Maint. requests
Staff Sup.
P.O.'s
Supplier catalogues
Stores catalogues
Tendering Information
Stock status Report
Purchase Approvals
Stores Orders
Budget Allocations
Boundary changes Transportation Policy
Report to Board
Births & Housing Data
Accommodation needs, alternatives

RESULTS OF THE STUDY

The study reported in this document provides a comprehensive analysis of the major activities of the Peel Board's central office operations and the types, levels and flows of information related to these operations. Not only are the major management areas analyzed independently, but the relationship between these is synthesized to form an overall integration of Board activities and information. This provides a structure which would not be obvious in the analysis of specific management areas or departments alone. In so doing, it identifies key areas of information-utilization activities and information-generating activities (i.e., sources and sinks of information) which provides the basis for specific information system design.

RECOMMENDATIONS FOR USES OF RESULTS

The results of this study can be used in a variety of ways. The set of activity analyses represented by the documents in Appendix B can be particularly useful to superintendents and their staffs whose main responsibilities lie in specific major management areas. These can be used as a documentation of the general and detailed functions in those areas, and of their relationship to other areas. Where necessary, they can provide useful information for designing new procedures within management areas. It is recommended that the documents be updated as changes in organization and functions occur within these management areas, so that they will continue to provide a detailed, up-to-date analysis of Board operations and information requirements.

The flowcharts in Appendix C can serve a similar function with respect to providing information about operations within activity areas. However, these have the additional advantage of representing flows of information within and between these areas in a manner which is impossible in the analysis documents. Although these can be used in conjunction with the documents by all interested staff, it is expected that the technical computer operations staff will be most interested in these outputs. To the systems analyst, these, along with the overall systems information provided in the flowchart in figure 4, and in Table 4 will provide the structure basis to:

1. Identify areas where computerized procedures could be designed to facilitate activities of the Board.
2. Determine information gaps and inadequacies.
3. Identify areas of information overload and redundancy.
4. Streamline overall information flows.
5. Design specific, integrated report generating procedures with the associated data base to meet the timing requirements of decisions or activities.
6. Design specific data files within the information categories defined in this document.

To the Planning Department, the outcomes of the study provide a unique overview of the range of Board operations. Since the planning function relates to activities which cut across departmental lines, the perspective provided as a result of this study can be useful in identification of areas where the Planning Department can provide inputs for procedural designs, or which can provide useful information for planning purposes.

U S DEPARTMENT OF HEALTH,
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION

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INFORMATION SYSTEM: ANALYSIS FOR THE PEEL BOARD OF EDUCATION

Volume II: Technical Appendices

Susan Padro

March 1977

EA 013 469
Vol. II

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY
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This volume presents the detailed, technical results of the information analysis at the Peel Board of Education as described in Volume I. A description of the contents of each appendix follows.

Appendix A

This appendix provides a preliminary overview of the departmental operations of the Peel Board. It is based on a series of interviews conducted at the outset of the study to provide the study team with a general understanding of the Board's functions.

Appendix B

This appendix contains the set of documents which provide the analysis of the major management areas. For each area, there is (a) an overview document, which lists the main activities or components in the area along with related inputs, outputs and participants, and (b) a set of detailed procedure analysis documents, which further break down each of the activities listed in the overview document. The detailed procedure analysis includes the steps in the process, associated input information and its source and resultant outputs and their timing. Participants and/or location are also presented for each step.

It must be noted that in some cases, a detailed procedure analysis document was not prepared for each component listed in the overview document. This may be due to the following reasons:

1. The overview document is sufficiently detailed, so that a detailed document for certain steps would be redundant.
2. Detailed flowcharts were prepared directly at the interviews, omitting the intermediate step of completion of the analysis document.

Appendix C

This appendix contains the flowcharts which relate to the analysis of the major management areas. For each area, an overview flowchart and detailed flowcharts are included, corresponding to the areas covered in the analysis documents. For some areas, however, flowcharts have not been prepared: these consist of areas which cannot be broken down into a series of steps which represent "flows" but suffice to have a listing of inputs and outputs for discrete components. In such cases, the analysis documents provide all the necessary information required for the analysis.

APPENDIX A

PRELIMINARY OVERVIEW OF DEPARTMENTAL OPERATIONS

LEVEL 1 MEETING: SCHOOL PROGRAM DEPARTMENT

(1) OVERVIEW

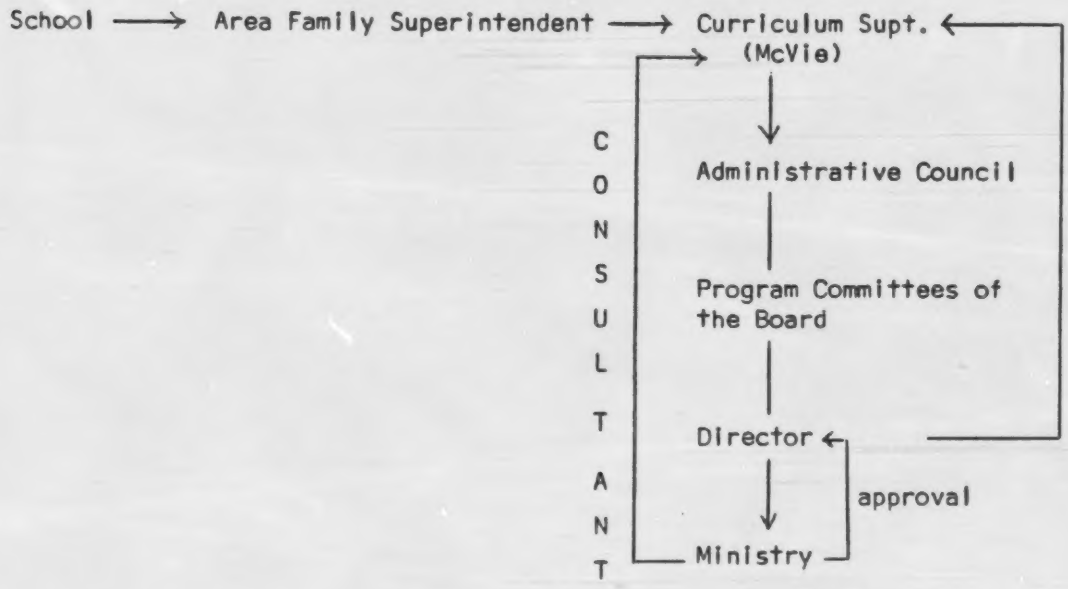
Superintendent of School Program: W. Douglas McVie

(a) Major Areas of Responsibility:

1. Curriculum development
2. Professional development
3. Education program research

(b) General

1. Doug McVie is a permanent member of the Curriculum Development Council.
2. Role still in a state of flux as a result of recent organizational changes.
3. Process for program change.


School
Area Family Superintendent
Curriculum Supt. (McVie)
Administrative Council
Program Committees of the Board
Director
Ministry
approval
CONSULTANT

(2) MAJOR FUNCTIONS WITHIN EACH AREA

1. - Curriculum Development (Doug McVie)

1.1 - Interpretation of Ministry curriculum guidelines for schools' use.

1.2 - Monitoring school programs:

- cataloguing secondary courses/programs and elementary program descriptions.
- approving all new courses/programs (esp. 'experimental' programs) prior to Board and Ministry submission.
- evaluating new courses/programs.

1.3 - Provision of guidelines for school program development:

- minimum course content
- program rationalization
- program objectives

1.4 - Curriculum resource development:

- non-certified 'teacher' resources for special programs
- media/learning resources: guidelines for acquisition.

2. - Professional development (Charlie Brown)

2.1 - Teacher in-service program development:

- perceive and anticipate teachers need in the field
- disseminate, interpret Board and Ministry guideline releases.
- leadership training
- communication skills

2.2 - Liaison with teacher training institutions.

2.3 - Teacher courses and conventions: Catalogue and disseminate to schools lists of relevant courses and conventions.

3. - Education program research. (Judy Spigel)

3.1 - Monitoring of Questionnaire Type Studies:

- general concern in the areas of curriculum, school program, etc.
- Ministry-initiated studies cover students, teachers, parents.
- internally initiated studies would look into areas such as:
    - sex, drugs, alcohol
    - open area
    - French

3.2 - Testing of Core Curriculum

- administration of standardized tests across the system
- data bank of test results has been generated but there is some difficulty to retrieve centrally (IBM).

4. - Priorities

4.1 - Aid to teachers where none has been available before -- i.e. professional development probably most important as a result of curriculum changes.

- Inservice for all teachers in a given area - i.e. universability of coverage in a specific area.

4.2 - Evaluation of outputs of schools, e.g. what is the impact of the schools on the youth.

4.3 - French immersion program

March 5, 1974

LEVEL 1 MEETING: PLANNING DEPARTMENT

(1) OVERVIEW

Superintendent of Schools (Planning and Development): Bill Lambie

(a) Major Areas of Responsibility

1 - Enrollment Projections

2 - Budget Reporting

3 - Contingency Planning

4 - Information

5 - Development of Realistic Time-Schedules and Time-Management Practices

(b) General

1 - The Objective of the Planning Department is to:

- develop planning information, and
- assist in developing good criterion-referenced, consensus decision processes

2 - Role of Planning Department

- The Planning Department currently is considered to be a short term function to:
  - analyze needs and design
  - act as a service and control function
  - serve as a training function
  - concentrate in the areas of facilities, contingency, evaluation and setting of objectives
  - the planning role will later be filtered down to other departments where it will be part of the on-going operations.

(2) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Enrollment Projections

- the development of expertise in enrollment projection is viewed as functional to the planning process - (refer to Bill Lambie's paper on Objectives of the Planning Dept., April 1, 1974)
- good enrollment projections allow for more accurate analysis for almost the whole spectrum of problem-areas in the system,

  e.g. - capital construction allocations
  - boundary changes
  - site location
  - facilities planning
  - transportation
  - budgeting, etc.
- requires organization and good communications with the other groups in the system

2 - Budget Reporting

- current involvement in the design and implementation of a new Budget reporting system
- Bill Lambie (Planning) is responsible for the design of the new system and Bill Keith (Finance) will take over the control aspects when developed
- objective of the system is the development of revenue/resource needs and information regarding costs of projects or studies.

3 - Contingency Planning

- anticipate and develop effective strategies for coping with specific contingencies that may arise
- part of the approach is to develop information for different simulations.

4 - Information

- the development of an accurate, responsive information system for the Board, the public, and the staff
- organized, relevant, timely and meaningful information would be most useful in areas such as transportation/bussing, accommodation planning, enrollment projecting, program planning, personnel, building, etc.

5 - Development of Realistic Time-Schedules and Time-Management Practices

- especially in terms of major programme and administrative planning e.g., review process for Building Specifications
    - Resource allocation system - management/program/services
        - accountability of objectives of superintendent level

(3) PERSONNEL

- organizational structure and staff to be obtained at later meeting

(4) PRIORITIES

- Budget Reporting System
- Enrollment Projections and the methodology and organization associated with the role of enrollment projections for planning.

April 4/74

LEVEL 1 MEETING: BUILDING AND PROPERTIES

Superintendent of Plant: (Derek Wilkinson)

(1) OVERVIEW

Major Areas of Responsibility

1 - Design and Construction
2 - Maintenance
3 - Caretaking
4 - Cap from Current Projects

(11) MAJOR FUNCTIONS WITHIN EACH AREA

(a) 1 - Design and Construction

Supervisor of Design and Construction: (Harley Phillips)

- has 1 assistant and 2 technical assistants
- his job is to convert educational briefs to reality
- must get Ministry and O. M. B. approvals
- recommends architect to Superintendent of Plant for Board approval
- tenders contract
- site supervision of construction
- recommends approval of progress payments

1.1 - Site Selection (D. Wilkinson, J. Greeniaus, H. Phillips)

- planning dept. chooses locations and is concerned with obtaining approval of need from the Ministry
- buildings and property people rule on the suitability of the location
- currently the County owns ninety sites

1.2 Plans/Specification (new Construction)

- planning; developer dedicates site
- eventually give site approval prior to dedication
- site evaluation (See 1.1)
- sketch plans based on planning dept. specifications and traditionally developed architectural standards/construction with area superintendents and principals.
- final plans and approval

2. Maintenance and Operations (Jim Ellison)

- 5 area supervisors of maintenance and operation - correspond to each area office, (i.e., family of schools)
- each area supervisor has a crew of 3 men; they tend towards general handyman rather than specialists
- there is a regular maintenance routine and in between minor repairs are handled as they occur
- there are two assistant supervisors - Stuart Lee and Peter Boesener. Mr. Boesener handles the current capital budget responsibilities. Mr. Lee is in charge of the central maintenance staff.

3. Caretaking

- large amount of caretaking done by contract and, part-time cleaners
- permanent staff small compared to other boards

(b) Breakdown on Activities by Budget

1 - current: repairs

2 - Capital/current: alterations, programmed upgrading of facilities, i.e. fire standards, lighting levels, etc.

3 - capital: new construction

(111) PERSONNEL

(a) Organization chart pending

(b) Responsibilities: Defined in Section (11)

(IV) PRIORITIES

1 - all three major areas of responsibilities have approximately the same priority except that there is a tendency to emphasize Design Construction

2 - all current projects and needs

3 - data bank project

March 21/74

LEVEL I MEETING: PERSONNEL DEPARTMENT

(I) OVERVIEW

Department Head: R. Steadman

(a) Major Areas of Responsibility

1 - Recruitment, Transfers & Separations (Non-teaching staff)

2 - Teacher Recruitment

3 - Salary Administration

4 - Employee Benefits & Safety

5 - Performance Appraisal, Promotion, Organization (in cooperation with line management)

6 - Negotiations (Resource department for Board)

7 - Collective Agreements

8 - Training & Development

9 - Communications & Counselling

10 - Personnel Records

(b) General

1. The inter-relationship between the major areas of responsibility are apparent since they are functions normally associated with personnel departments.

2. Mr. Steadman is directly responsible to the Superintendent of Business Affairs but also functionally reports to the Superintendent of Academic Affairs.

(II) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Recruitment, Transfers & Separations of Non-Teaching Staff

1.1 - Recruitment: (Mrs. Chapman/Mrs. Ward)

- office and secretarial staff - (Mrs. Chapman)
- supervisory and administrative staff)
)
- custodial and maintenance staff)
) (Mrs. Ward)
- lay help (A.V. technicians))

1.2 - Transfers:

- arrange suitable transfers
- CUPE involved
- all processing done by the personnel dept

1.3 - Separations:

- process termination and inform payroll
- conduct exit interviews for staff who leave voluntarily

2 - Teacher Recruitment (S. Pawloski /S. Colbert/Pat Morgan)

2.1 - Recruitment:

- request from principal for new person; (need for new teachers established by Mr. Dobson)
- Advertisement placed in newspapers
- all applications sent to principal and area superintendent whether in answer to an ad or a drop-in at the central office
- appointments must be approved by Mr. Dobson and the Board; information must be sent to Mr. Dobson for this purpose
- following approval, all processing done by the personnel dept

  e.g. - acceptance of position form prepared, signed, etc.
  - personnel dept must approve of the salary arrangements (initially determined by Sharon Pawloski and Pat Gordon)

2.2 - Transfers/Terminations:

- transfers processed by personnel dept
- process terminations and inform payroll

3 - Salary Administration (Rick Meade)

- position descriptions
- job evaluations (e.g., determination of salary range)
- classification of positions; nb. CUPE negotiates classification for all office, clerical, personnel lay assistants
- salary surveys
- administration and interpretation of teaching and non-teaching salary schedule
- payroll documentation

4 - Employee Benefits and Safety (TBA)

- administration of group insurance plans
- workmen's compensation
- liaisoning with Insurance Companies
- providing statistical data - a report prepared manually on a regular basis for Insurance Co.
- benefit counselling of teaching and non-teaching staff (priority item)

5 - Performance Appraisal, Promotion, Organization (R. Steadman/Lloyd Dobson) (in cooperation with line management)

- assessing performance:- Chiefly non-academic personnel
  - Steadman evaluates non-academic personnel
  - Dobson evaluates teaching personnel

- recommending promotions
- recommending organizational changes
- suggest policies of constructive discipline

6 - Negotiations (Resource Department for Board)... (R. Steadman)
  - act as resource people to the Salary and Staff Relations Committees of the Board since administration has no authority to speak for the trustees. e.g., Steadman & Townsend provide liaison between personnel and academic affairs
  - provide statistical data and advise on salaries, costs, policies and procedures to Salary Committee and Staff Relations Committee (Mrs. Pawloski)
  - liaison with Chairman and members of staff negotiating committees
    - Steadman - member of salary committee acting as resource person.

7 - Collective Agreements (R. Steadman)
  - administer provisions
  - conduct grievance hearings for non-academic staff
  - suggest revisions in content and language (in new agreements)

8 - Training and Development: Non-teaching staff
  - staff induction
  - safety training
  - supervisory training
  - staff development

9 - Communications and Counselling (R. Steadman)
  - communications with staff
  - provide information of changes in legislation, Board policies and other matters of mutual consent

- provide counselling services on request on job opportunities and personnel problems relating to work situations
- liaise with line staff and supervisors, principals, superintendents, etc. to determine needs and provide service

10 - Personnel Records (Mrs. Ward/Mrs. S. Pawloski)

- Request, receive and maintain in confidence comprehensive records on all employees, i.e., official files:
  - duplicate (may be triplicate) files on teachers; area office and schools may also have copy
  - file locked and restricted to all
  - accessed only with people in personnel dept

(III) PERSONNEL

(a) Organization chart: pending

(b) Responsibilities

- department staff divided into academic and non-academic staff
- 3 academic staff: Mrs. S. Pawloski (sr. person)
  Sharon Colbert (assistant to Mrs. Pawloski)
  Pat Morgan (new)
- non-academic staff: Mrs. Chapman - office & secretarial staff
  Mrs. Ward - paraprofessionals, lay assistants, etc.
- R. Steadman in charge of senior staff

(IV) PRIORITIES

- essentially equal priorities on all major areas of responsibilities but special emphasis on:- Negotiations
  - Employee Benefits
  - Personnel records (very important for the academic affairs office)

March 21, 1974

LEVEL 1 MEETING: FINANCE

Superintendent of Administrative Services: Bill Keith

(I) OVERVIEW

(a) Major Areas of Responsibility

1 - Budget and Expenditure Control

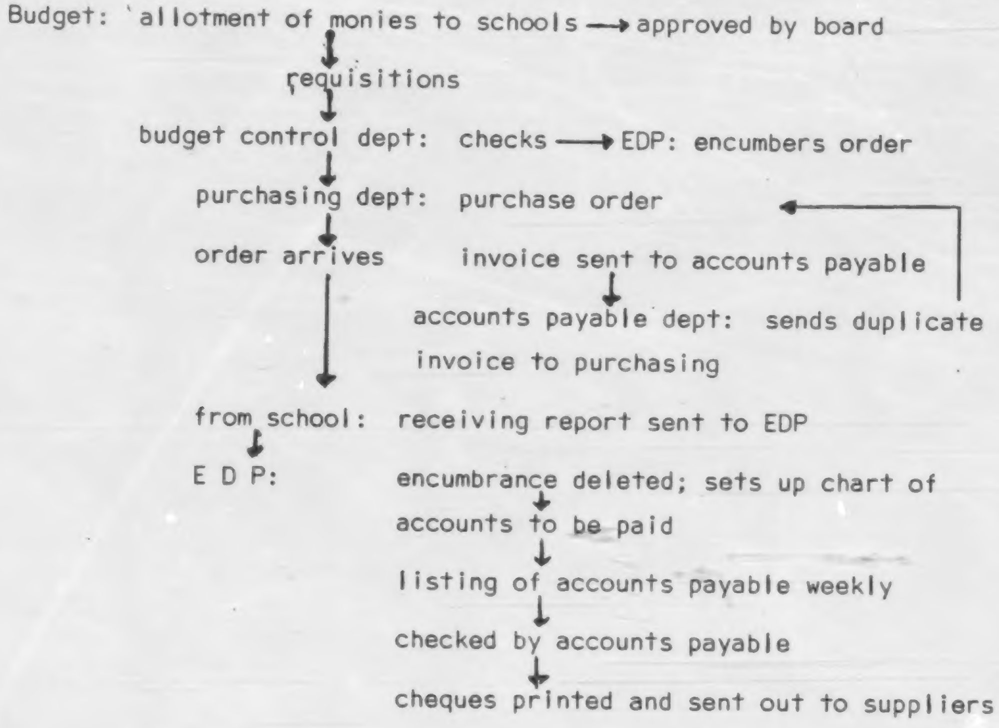
2 - Revenue

3 - Payroll

4 - Purchasing

(b) General

1. The interrelationship between the areas of responsibility is in the purchasing and ordering for all materials used in schools which forms the major operational link, i.e.,



Budget: allotment of monies to schools → approved by board

requisitions

budget control dept: checks → EDP: encumbers order

purchasing dept: purchase order

order arrives invoice sent to accounts payable

accounts payable dept: sends duplicate invoice to purchasing

from school: receiving report sent to EDP

E D P: encumbrance deleted; sets up chart of accounts to be paid

listing of accounts payable weekly

checked by accounts payable

cheques printed and sent out to suppliers

(II) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Budget and Expenditure Control (Shirley Harrison/Ken Dudman - chief accountant)

1.1 - Budget Control:

- board establishes budget
- finance people control expenditures to keep within the budget
- budget officer clears all encumbrances to budget after items received and charged to accounts payable

1.2 - Budget Process:

- contribution is primarily one of inputs to the process
  i.e. - provision of historical data
  - information on ceiling and revenue via liaison with the planning academic people, enrollment projections, with ministry on available funds, other sources.

1.3 - Accounts Payable:

- weekly listing of accounts payable - EDP

2 - Revenue (Ken Dudman - chief accountant)

2.1 - Accounts Receivable:

- primarily billings for community use of schools

2.2 - Acquisition:

- ensure maximum benefit from provincial aid; i.e., find existing sources of revenue and utilize them.
- revenue from fares, etc.

3 - Payroll (Marion McDonald)

- EDP operation
- linkage with personnel dept. (espec. fringe benefits)

4 - Purchasing (P. Porter)

4.1 - Inventory:

- this includes the operation of the warehouse and stockroom

4.2 - Courier Service:

- deals with the distribution from warehouse to schools, etc.

4.3 - Printing Shop:

4.4 - Service:

- mailroom; duplicating; switchboard
- office services under supervision of the purchasing officer

(III) PERSONNEL

1 - Organizational chart is pending

2 - Responsibilities

- personnel responsible for the major areas are given in Section (II)
- detailed responsibilities will be identified in subsequent meetings

(IV) PRIORITIES

1 - Annual budget to the Board, to the Ministry

2 - functioning financial system for 1974 - especially payroll system

3 - systems development for financial system

4 - review of the manual routines and paper flow for accounts payable and purchasing, and interfacing with the computer

(V) NOTES

1 - GEAC:

- no documentation, no run schedules
- no run manual to determine how to extract information
- insufficient programming ability
- ad hoc operation

2 - Budget:

- '74 system expanded to allow budget accounts to be broken down by dept. and families
- new account numbering causing problems in bringing EDP system up to date

3 - EDP Operation:

- payroll
- accounts payable; weekly listings
- general ledger: expenditure accounting, including encumbrance system

April 4, 1974

LEVEL 1 MEETING: TRANSPORTATION

1 - Organization: - J. Brown: Superintendent of Business Affairs
- Enid Britten: South Area Business Officer
- Willa Woodill: North Area Business Officer

2 - General

- contract buses; 1½ mill expenditures
- 11 contractors, 170 buses
- own 2 buses
- route design - plot with pins on map

3 - Bus Contracts

- tender on number of buses, not students; number of students used to determine the number of buses
- contracts let
- routes redesigned and assigned

4 - Operations

4.1 - Regular Runs:

- have list of bussed students but is not up-to-date except for periodic head counts; list is prepared in October
- list of special education kids always up-to-date
- small operators handle their own routes, complaints, etc
- otherwise complaints, regular transportation problems, etc. handled by Enid Britten
- policy: - under 2 miles 'no bussing' except for
    - danger areas, illness, and K to 3 for Dec to Mar if greater than 1 mile

4.2 - Special Runs:

- special or extra runs over and above contractual tender
  - e.g. - kindergarten
    - home economics run
    - special runs to the city for the handicapped
      - leave morning, return afternoon
      - mini buses deliver students to embarkation point and 2 buses deliver students to the city

4.3 - Taxis:

- for special education kids
- handicapped
- temporary disability, i.e., broken limbs, etc.

5 - Grants:

- principals provided number of students; forms are sent directly to the principals from the Ministry for this purpose
- bus operators submit number of miles; forms are given to them by the Board
- Enid Britton compiles grant application
- recover 86% of transportation costs by the grant

6 - Problem Areas

- would like information from Special Education people earlier
- poor communication when migration - from principal
  - from spec. ed.
  - from parents
- where classes are set up.

March 13, 1974

LEVEL I MEETING: COMPUTER OPERATIONS

Murray Skinkle

(I) OVERVIEW

(a) Major Application Areas

1 - Financial System

2 - Payroll

3 - Tests

4 - Scheduling Reports

(b) General

- Murray Skinkle responsible for computer operation; essentially a one-man operation
- Contract out to GEAC for all services
  - Computer (Hewlett Packard); physically located at the Board
  - All support staff, programmers, systems analysts, operators, etc. provided by GEAC.

(II) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Financial Systems (B. Keith)

1.1 - Purchase Order - Routine: (P. Porter)

- Responsibility of the purchasing dept.

1.2 - Payment of Invoices - Routine: (B. Keith)

- Account Payable Dept

1.3 - Journal Entries - Routine: (Ken Dudman)

- Budget/Accounting

1.4 - Trial Balances - Routine: (Ken Dudman)

- Accounting Dept

1.5 - Ministry Reporting: (Ken Dudman)

- Accounting Dept
- Not a program but uses the output from the other routine to prepare the report

1.6 - Inventory Control or Stores Order: (M. Skinkle/P. Porter)

- under development; target date Sept/74

2 - Payroll (Marion McDonald)

- cheques produced via master program
- new employee routine - create new records
- proposed development of a new Payroll/Personnel file (B. Steadman) Ministry has tapes on all teachers' certification
- The following reports and routines to produce them are given below:
    - TD4 routine
    - Superannuation routine
    - OMERS: Ont. Munic. Employees Retirement System (i.e., non-teaching pension plan)
    - UIC routine
    - Group Life Ins. routine
    - Taxable Benefits
    - OHIP
    - Distribution: distributes pay according to function or panel charged to

- Calculation of pay) for negotiation purposes, update of
)
- Payroll grid) new salary levels, etc.

3 - Tests (M. Skinkle)

- Scheduling program)
) GEAC
- Mark Reporting - as of Sept 1/74)

4 - Scheduling Reports (M. Skinkle)

- secondary teacher analysis wrt periods, number of students taught, free-time, etc.
- program analysis by school, by superintendent, by board

(III) PERSONNEL

- M. Skinkle is responsible for computer operations at the Board. GEAC is responsible for supplying all hardware and software services
- the people responsible for setting up the runs for various applications are given in selection (II).

(IV) PRIORITIES

- Priorities for the various applications are (1) Financial System, (2.a) Inventory control, (2.b) Scheduling, (3) Payroll, (4) Mark Reporting

March 28/74
April 23/74

LEVEL 1 MEETING: SPECIAL (Student) SERVICES

(I) OVERVIEW

Superintendent of Special Services: Bill Quance

(a) Major Areas of Responsibility

1 - continuing Education Services

2 - Psychological Services

3 - Attendance Counselling

4 - Special Services

(b) General

1 - The linkage between the areas is that they all are outside the normal range of services

2 - The orientation is countywide rather than school level

3 - Decentralization is occurring, consequently all field representative now answer to the field supervisors. The central officers (with the exception of Continuing Education) act as consultants to the field office

4 - Special Education is a service and not a discipline, dealswith kids, teachers, parents, professional groups, etc.

(II) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Continuing Education (Walter Ward)

1.1 - administration of night school (ca.8000 registered)

- summer school, both elementary and secondary (ca.3000 registered)

1.2 - handle referrals of drop-out students for follow-up

- alternatives to education geared towards drop-outs or potential drop-outs (ca.125 stud)

1.3 - holiday travel/excursions:

- mechanism for screening travel agencies:
- credit travel program:- credit course on trip abroad
  - carried out by Peel teacher staff overseas
  - usually summer school

1.4 - training of parent volunteers (elementary schools)

1.5 - coordination of correspondence schools; tutors available; use Ministry's correspondence courses

1.6 - liaison with community organizations

e.g. community colleges to prevent overlap

- General Council of Children's Services - representation by Board
- regional gov't will help coordination

1.7 - career's orientation (Ernie Nielson); work experience and courses for credit

2 - Psychological Services (Ashton McKinnell)

2.1 - Traditional Function

- psychological diagnostic service - learning difficulties due to psychological or learning disabilities (ca. 2 1/3 - 3% of student population)
- make recommendations on instructional procedures
- referral by principal, teacher or parents; written report accompanied by verbal discussion

2.2 - Home-School Liaison Function

- for kids who require more intensive services
- referred to community agencies with feedback

2.3 - General Consultative Service

- the above 2 areas are treatment oriented, this area has impact

- on the whole system wrt all kids, with object of prevention
- workshops for teacher groups (primarily A. McKinnell)
  - evaluation techniques; curriculum development
  - various committees

    e.g., Curriculum Development Council - trends, needs, implementation

    Primary Education Task Force

    Testing and Evaluation Program Committee - 3 to 4 year periodicity for county programs

2.4 - Volunteer Groups

- geared to a limited number of kids
- volunteers from various community organizations work individually with problem children (a one-to-one situation)
- these are lay people trained by Psychological Services
- volunteers supervised by staff
- volunteers go to the schools 2-3 times per week, mostly elementary schools
- they need all the information they can get concerning a child, therefore need parental consent
- very successful program, the support to the child is both emotional and academic
- with this kind of help over and above what a teacher can give, some children can stay in a regular class

3 - Attendance Counselling (Mrs. DesRoches)

3.1 - Counselling Services

- involves parents and students, assessing problems at home
- referrals come from principals, parents, community agencies, etc.; passed on to psychological services as necessary
- supportive casework counselling; object is to improve the living and

learning conditions of a child.

3.2 - Provincial Courts (Family Division)

- usually attendance problems - problems with parer
  - unmanageable children
  - etc.

3.3 - Liaison with Home, School and Community Agencies

- team approach, mixed disciplines
- Children's Aid, Public Health Nurse, Peel Family Services, etc.
- refer to "Annual Report of Attendance Councilling Service for 1972-73".

3.4 - Early School Leaves

- new legislation allows 14/15 year olds to leave school
- special committee set-up to handle this
- requests from parents go to this committee

4 - Special Services (Bill Quance, Bob King)

- special services is basically an accounting system for students in special programs

4.1 - Evaluation

- selection made by principal
- lack of resources requires principal to make evaluations and selections as to who will enter programs - special ed programs, summer school
- rank priorities on children entering programs
- psychological services and principals send data or child to Bill Quance (e.g. evaluation form submitted by principal)
- problem is lack of space; lack of data on teachers with special ed certificates
- nb: could use teacher file and computerized student cards.

4.2 - Budget Control

- need budget control to ensure money is used for special ed purposes; this money should be differentiated from the regular grant per student
- need monitoring to ensure money goes for what it was originally intended; this is the area superintendent's responsibility
- 1,500 vocational; 240 retarded; 1,400-1,500 in elementary; at least 3/4 of these schools have special ed program.

4.3 - Teacher Hiring

- make recommendations on teacher hiring

4.4 - Facilities

- could advise on type of supplies and equipment to be ordered
- where in system these are located, available and even if they exist
- monitor balanced use of facilities
- part of future planning as to requirements.

4.5 - Transportation

- establish list of special ed children before end of June - to be sent to transportation officer
- problem of change of address when special ed dept is not informed

(III) PERSONNEL

- Bill Quance has 4 people working for him. Their responsibilities are defined in Section (II).

LEVEL I MEETING : FAMILY OF SCHOOLS

I. OVERVIEW

(a) Major Areas of Responsibility

1. - Relationship with the Office of Academic Affairs
2. - General Responsibilities of the Superintendent of Family of Schools
3. - Staffing/Hiring
4. - Leadership/Development/Promotion
5. - Support Services
6. - Budget

(b) General

Family of Schools

- Pairs of Superintendents of Family of Schools are paired in field offices so that they can share the same resources.
- Each Family Superintendent handles the direct affairs of the schools in his family.
- Family Superintendents act as liaison between families, and also between schools and the Board.
- All information related to Family of Schools goes through Superintendent of Academic Affairs office (e.g. - resignations, moves, etc.)
- Each field office defines its own needs.

II. MAJOR FUNCTIONS WITHIN EACH AREA

1. - Relationship with the Office of Academic Affairs.

- Initially the function of the Office of Academic Affairs is one of monitoring and affecting change at the superintendent level and then a control function. In general, the central office is responsible for:

1.1 - Coordination and Supervision of the activities of the Family of Schools.

- The Superintendent of Academic Affairs (M. Townsend) supervises and his assistant (Lloyd Dobson) cordinates the activities of the Family of Schools.

- L. Dobson chairs regular meetings of Superintendents - generates information.

1.2 - Evaluation and reporting to the Director on the performance of the Superintendent of Family of Schools.

- Lloyd Dobson chairs a committee to look at performance review, and develop a pattern relating to salary.

1.3 - Implementation of the Philosphy of the Board at the School Level.

- The Director is to develop a set of priorities based on the objectives of the superintendents.

- i.e. each family establishes its own objectives and the results are evalvated at the year's end.

2. - General Responsibilities of the Superintendent of Family of Schools.

- The emphasis in the Family of Schools: The Superintendent operates in a "democratic" fashion - feeling of "family."

- This has been done in capital expenditures, but may also go into staffing, programming, etc.

In general, the Superintendent of Family of Schools has the following responsibilities:

2.1 - Supervision, Staffing, Budgeting, as described in the previous sections.

2.2 - Professional development within the Family of Schools.

2.3 - Community Relations with:

- local trustees
- parents

2.4 - Control of Conference and Workshop Budget.

2.5 - Liaison: with other families, teacher groups.

2.6 - Evaluation of Principals:

- Part of a team of 3 members:
  - academic affairs representative
  - the Superintendent of the Principal
  - independent Superintendent

3. - Staffing/Hiring

3.1 - Staffing:

- Staffing requirements are based on enrolment projections supplied by the planning department and which may be modified by the Academic Affairs Office.

- Must operate within the pupil/teacher ratio set by the Board; included in the ratio are non-teaching personnel, special education and special teacher pools.

- The number of staff for each Family is determined and then the enrolment and staffing figures are given to each Superintendent of a family who then distributes and assigns his staff at his discretion.

3.2 - Hiring:

- Superintendent's office sets up process for hiring and recruitment.
- The principal does the actual interviewing and selection of a candidate.
- The field office does the screening and official hiring.
- The problem of surplus teachers at mid-year is handled by curtailing hiring on a discipline basis until the surplus teachers are placed. (Handled by the central office?)
- Elementary teacher surplus is usually handled by the Family Superintendents.
- Requests for transfer are handled after placement of surplus teachers but before needs for new teachers are posted.

4. - Leadership/Development/Promotion

4.1 - Promotion:

- Primary responsibility for staff evaluation rests with the Superintendent of Schools and principals.

- The policy is that every staff member must be evaluated every 2 years.

- Principals evaluate teachers, then the Superintendent reviews and comments.

4.2 - Leadership Development:

- Leadership Development Program: Teams made up of central office personnel (Superintendent etc.) plus Family Superintendents and Principals evaluate Principals and Vice-Principals in terms of expectations.

- Team selects and evaluates candidates; sets tasks (experiences) required for development.

- The central office plays a coordinating role in the "Leadership" Development Porgram.

5. - Support Services

- Each field office has its own support services and personnel

e.g. - consultants for specific academic areas and resource teachers are housed in the field offices. (Liaison with centrol office - Program Superintendent responsible for area coordinators)

- Maintenance Supervisor; phys ed; etc.
- Business Officer who is responsible to the Superintendent of Business Affairs but is housed at the field office level.

6. - Budget

- Superintendent of Family of Schools responsible for budget for field office budget and review of Principal's expenditures.
- Assures it reflects the priorities of the schools art programs, etc.
- There are two main budget categories: capital current and consumable supplies.

6.1 - Capital Current:

- Distributed to schools by the field offices.
- Equipment purchases
- Minor renovations; (structural change requires approval from the central office, i.e. the Plant Office)
- Special expenditures for large items can be skimmed of the top for the Family of Schools needs.
- Alloted to an area on a per pupil basis.
- Superintendent of Schools has flexibility in allocation to specific schools.
- Formula recommendation goes through Academic Affairs and Business Office jointly.

Staff budget committee - reviews priorities for budget items. Next year the Superintendents will present their own budgets to include all categories.

6.2 - Consumable Supplies:

- Schools receive a global budget based on a formula.
- Principal spends it to reflect priorities.
- Superintendent of Family monitors this spending.
- Also the Superintendent receives a small allocation to provide flexibility for special programs.

III. PERSONNEL

- Office of Academic Affairs:

Superintendent of Academic Affairs - Marvin Townsend
Assist. to Superintendent of Academic Affairs - Lloyd Dobson

- Family of Schools:

There are 10 Superintendent of Schools (Family of Schools)

April 9, 1974

LEVEL 1 MEETING: SUPERINTENDENT OF ACADEMIC AFFAIRS OFFICE

(I) OVERVIEW

Superintendent of Academic Affairs: Marvin Townsend

(a) Major Areas of Responsibility

The main concern is with the quality of the academic program in the system, especially the following areas:

1 - Direction

2 - Program

3 - Assessment

(b) General

The superintendent of academic affairs has the following roles: (1) operational - in connection with Mr. Dobson; (2) leadership-e.g.coordinat the activities of all of the superintendents of schools. Currently the operational role is emphasized rather than leadership. Once the reorganization is over, the concentration will be on leadership; (3) Interaction with Executive Committee and Board of Education (collectively/individually).

(II) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Direction

1.1 - Major Direction:

- Major direction is with the Superintendents of the Family of Schools and to a lesser extent, the principals. Essentially a field oriented job.

- usually a one-to-one situation where the superintendent of academic affairs talks to the superintendent of the family of schools, to discuss the board's views and coordinate superintendents' goals with the board's.
- generally try to stay away from the schools per se, the responsibility of the Family of Schools' superintendent but, periodically sit with the Headmasters' Association, refer to Section (1.2).

1.2 - Staff Involvement:

- heavy involvement with staff by informal visits to the schools with Superintendent of Schools.
- meet with the secondary principals through the Headmasters' Association executive
- meet with the elementary principals and vice-principals through the Elementary Principals' and Vice-Principal's Association
- meet with executives of E.A. and OSSTF through Executive Council.

1.3 - Evaluation:

- continuing reassessment of evaluation procedures for teaching staff to be developed in 1974-75
- nothing formal, especially after one is already on staff
- secondary principals' evaluation - a committee consisting of Headmasters, representatives, Superintendents, and L. Dobson
- elementary principals' evaluation - usually a team which includes a superintendent from the central office (Mr. L. Dobson).
- a committee is in process of developing a formal procedure

for evaluation of the Superintendents of the Family of Schools.

1.4 - Leadership Program:

- ongoing review of need for various leadership roles (Planning Department and Leadership Superintendent Committee).
- MLT administers program and chairs leadership teams committee meeting.
- identification of candidates
    - work directly with candidates in schools, principals and superintendent of schools.
    - a team of 2 visits prospective candidate, 3-4 times per year to review needs, objectives, present progress.
- ongoing leadership training (carried out by Program Dept.) (D.McVie) after annual review and planning by superintendents of schools, Leadership Committees.
- an Evaluation Program Committee has been set up which defines leadership specifications for all positions. Mr. Lambie is responsible for the process and Mr. McVie for all of the in-service and professional development that parallels the process.

2 - Program:

- program evaluation done by the Program Department and then discusses, makes recommendations to (a) Mr. Townsend, (b) Administrative Council.

3 - Assessment:

- meeting of 4 superintendents weekly for short term goals, immediate problems.

- long range planning ,e objectives is reviewed by this group

(III) PERSONNEL

(a) Organization

- all of the Superintendents of Schools (Family) and L. Dobson, B. Quance, Bailey, D. McVie, report to M. Townsend
- the Superintendent of Planning (B. Lamble) reports directly to the Director's office but works closely with the Academic Affairs office.

(b) Responsibilities

1. Lloyd Dobson
   - Superintendent of Schools (Assistant to the Superintendent of Academic Affairs)
   - plays the major operational role with the staff, e.g., Staffing, principals' evaluation, funding of programs; chairman of the Academic Council.
2. Bill Quance
   - Superintendent of Schools (Special Services)
   - directs chief psychologist, attendance counsellor; with his assistant B. King acts as a consultant, and with W. Ward deals with special educational services.
   - the reorganization has altered his job; he now assists the Superintendents of Schools in an advisory, consultative role. Because of the decentralized new structure, his duties now are:
     - development of programs
     - development of professional development program, in service training, recruitment of staff (new).

- work in cooperation with and liaison with Superintendents of Schools
- less emphasis on operations and more on planning, policy and prof. development function in the area of special services.

3. Doug McVie
   - Superintendent of school (Program)
   - involved in program and professional development
   - supervision of consultative staff, recommendations re long range planning in this area.
   - emphasis is to get into the schools for personal contact and input
   - sharing of responsibilities with the Superintendent of Schools (Field) in determining needs, goals; concentrate more in leadership; need recognized to do more long range planning in the areas of professional development, leadership, needs re services
   - supervision of Measurement and Research and Development (Judy Spigel)
4. John Bailey
   - Superintendent of Schools, (Assistant to Academic Affairs Department)
   - leadership role in adhoc committee work, e.g., alternatives to supply teaching, evaluation of teachers, surplus staff, interviewing of staff for responsible positions
   - makes recommendations to Central Superintendents' Council re above
   - liaison with OSSTF, EA etc. in ongoing studies.

5. Bill Lambie

   - Superintendent of Schools (Planning)
   - although is responsible directly to the Director's office, he is in close liaison with Mr. Townsend
   - has the leadership role in the design to help principals and superintendents to look at long-term goals and planning
   - his long-term planning activities include:
     - population projections - assistance in staffing, facilities
     - assistance ot Area Superintendents on questions such as boundary changes, program, staff needs, planning for future, etc.
     - special ed. planning.

(IV) PRIORITIES

1 - Leadership Development:

- growing role in the future - as effective strategy for introducing change in system
- leadership role in education as a system rather than just school
- change in system must be at grassroots level and reflect staff needs, attitudes, input.

2 - Emphasis on the human element of administration

- must be aware that a large system can often be insensitive to many people's needs
- personalize role and contact of senior officials vis-a-vis teachers essential

3 - Quality of Program:

- monitoring function
- fill needs of kids and requirements of parents, Board of Education.

(V) NOTES:

1 - Possible Information Needs

1.1 - Staff Information - leadership

- task force personnel

1.2 - Facilities Inventory:

- upgrading of facilities - need systemwide review to establish priority for program of upgrading; library/resource

1.3 - Capability to Monitor School Expenditure: distribution of funds within family, within individual schools. Emphasis on physical rather than human resources.

May 14/74

LEVEL 1 MEETING: BUSINESS AFFAIRS

Superintendent of Business Affairs: Jack Brown

(I) OVERVIEW

Major Areas of Responsibility

1 - Supervision of business affairs of the Board

2 - Treasurer of the Board

3 - Executive

(II) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Supervision of Business Affairs

1.1- Functional Areas:

1.1.1- Directly report to the Superintendent of Business Affairs:

- Assistant to the Sup. of Business Affairs (Murray Skinkle); reports directly to Jack Brown; responsible for computing services
- Personnel division
- Area Business Officers; North & South Areas; E. Britten & Willa Woodill

1.1.2- Superintendent of Business Affairs Accountable for:

- Administrative services (Bill Keith)
- Accounting services
- Plant Division (Derek Wilkinson)
- Report to trustees on all areas in the jurisdiction
- Transportation: responsible for policy and tenders. The day-to-day operations are handled by the 2 area business officers.

1.2 - General

- general philosophy is that academic needs must be taken into account and not just a business approach *per se* (e.g., resource allocation based on academic needs)

- role of giving inputs to the educational program from the viewpoint of non-teacher
- Integration of educational facilities with the community:
  - view of total needs of community served by education
  - integration of community agencies to meet needs
  - advisor to Planning Dept who has the formal responsibility in this area
- Liaison with municipal agencies: knowledge of municipal personnel; contacts with municipal personnel retained; eventually Planning Dept will take over.

2 - Treasurer to the Board

  - role of treasurer is to ascertain what the Board's eventual financial commitments will be
  - negotiate and purchase school sites from developers
  - liaison with the Ministry in obtaining financial resources.

    B. Keith is responsible for the administration of the money

3 - Executive

  - executive role through membership on the executive committee and administrative council
  - Executive Committee:
    - director, academic officer, business officer
    - held at end of each administrative council meeting and on call
    - salary negotiations (excluding the Director)
    - personnel matters, appointments
    - delicate matters
  - Administrative Council:
    - executive committee members, auditor and all superintendents

- meet weekly
- anything to be presented to the Board is dealt with here first

(III) PERSONNEL

3.1 - Organizational chart: available

3.2 - Responsibilities

- given in Section II

(IV) PRIORITIES

1 - all financial responsibilities

2 - provision of facilities and accommodation for growth needs

(V) GENERAL NOTES

5.1 - Linkages:

5.1.1 - Planning Department

- work with developers for yields, etc. The superintendent of Business Affairs office is responsible for the purchase of sites.

5.1.2 - Field Offices

- administrative assistants are under the superintendent of that area
- little contact with the Superintendent of Business

5.1.3 - Internal

- Plant: - design and construction people work together with Planning Dept
  Maintenance and Caretaking Dept linked to Purchasing Dept
- Payroll: linkages to everybody
- Personnel:authorizes payroll changes
- Budgeting & Accounting: - administration of budget by field superintendents
  - business office controls capital expenditures

- Business Superintendent & Board:
    - strong linkage
    - Board expects information from J. Brown
    - formal information transmitted via reports by operational areas
- Social linkages for good of Board:
    - Halton church extension council
    - Drug centre
    - Advisory Board of ERAS

5.2 - Critical Factors:

- School Trustees

June 5, 1974

LEVEL I MEETING: DIRECTOR'S OFFICE

(1) OVERVIEW

Director of the Peel Board of Education - Mr. John Fraser

(a) Major Areas of Responsibility

1 - Relationship Between Senior Administration and Elected Officials

2 - Developing Objectives and Structure of the Organization

3 - Relationship with the Community

4 - Relationship with the Ministry

5 - Leadership Role

(b) General Comment

- The Director is not responsible for the actions of the Board; he is not the Board's spokesman; that is the responsibility of the Chairman of the Board
- The Director is responsible for the operations of the system and implementation of the Board's policy

(2) Major Functions Within Each Area

1 - Relationship Between the Senior Administration and Elected Officials

- most critical to develop an open relationship with trustees
- relationship between trustees and administrators is developed through the following:

1.1 Standing Committees:

- Director ensures that these committees function properly;
- Members must be prepared for the meetings
- Assignment of staff as members of these committees are usually related to staff members' areas of responsibility

1.2 Regular Board Meetings

- Director ensures that materials are prepared and sent to trustees in advance

1.3 "Working Partnership" Between Board and Administrators:

- Director's role to protect the staff in the face of the Board
- Director strengthens the role of the staff

2 Developing Objectives and Structure of the Organization

- Director has greater objectivity due to lack of vested interest

- takes responsibility for the organization as it is now designed and for its productivity

3 Relationship with the Community

- public relations, e.g., information to community organizations
- explains what the Board is trying to do through the notion of "system", i.e., a common set of objectives for the organization as a whole.
- public inquiries usually come to the Director first, who then decides how and who should handle the issue
- Director tries not to be a member of any specific community committees, otherwise he would be inundated with these
- the rapid growth of the county has led to a proliferation of committees and many well-organized interest groups
- Director sits *ex officio* on committees

4 Ministry

- Director takes an active role when dealing with senior Ministry staff (i.e., Wells, Davis)
- depending on the issue, will participate in occasional meetings with regional Ministry staff

5 Leadership

- issues arise which consume a great deal of time; often the Director has to react to a situation having too many unknowns.

- often required to speak to federations and associations; also invited to speak in the standing committees.
- active role in leadership development of staff; he is one of two members on committees dealing with potential leaders in the system.
- handles serious personnel problems, especially when confidentiality is required.
- chairs the Administrative Council: involves setting up the agenda, sharing of information, integration of all components.
- Director coordinates all major meetings in the system to reduce conflicts; most meetings held at night.
- Director is the executive member at the regular Board meetings and also sits in on any other meetings that have important agenda items.
- attends special functions.

6 Priorities

1 - Partnership with trustees - greatest need now
2 - Relationship with staff
3 - Relationship with the community
4 - Catalyst for specific issues, e.g., major thrust in primary education.

7 General Notes

1 - Circular Organization Chart:

- information feeds in from the departments
- system policy matters go directly to the Director
- in cases of doubt as to whether administration or Board should take action - goes to Board as information
- matters are referred to the standing committees for solution. If action is recommended by the committee it must be ratified by the Board. - All reports, committee resolutions, information, etc. must go via the Administrative Council before being sent to the Board.

- Director follows up on all Board resolutions to ensure action is taken - a log of Board resolutions is kept..

APPENDIX B:

ACTIVITY ANALYSIS DOCUMENTS

MANAGEMENT AREA: 1.1 BUDGET PREPARATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Prepare budget guidelines	1. Budget format 2. Expenditures - current year to-date 3. Budget - current year	1. Budget Guidelines -forms -instructions -expenditure summary (current year)	Supt. of Finance
2	Prepare school requests	1. Cap-current requests 2. Special requests 3. Mtce. requests	1. School requests	School staff
3(a)	Prepare Area Requests, priority rank	1. School requests 2. "Overheads" 3. Budget Guidelines 4. Consultation - Finance	1. Area requests 2. Requests to Departments	Superintendents - Families
3(b)	Prepare Department requests, priority rank	1. Program requests - Dept. 2. Program requests - areas 3. "Overheads" 4. Budget Guidelines 5. Consultation - Finance	1. Department requests (Forms BD-1, 1(a), 2(a))	Department Heads
4	Prepare Superintendency Requests, priority rank	1. Area requests 2. Department requests 3. "Overheads" 4. Budget Guidelines 5. Consultation - Finance	1. Superintendent requests (Form BD-2)	Superintendents
5.	Total Budget Compilation	1. Superintendent Requests 2. Dept. and Area Requests	1. Budget Request	Superintendent of Finance
6	Budget Review - Internal (adjust, revise)	1. Budget Request 2. Consultation - Supts., Dept. Heads 3. Revenue Estimates 4. Ceiling Calculations	1. Revised Budget Request (approved in principle)	Admin. Council
7	Budget Review - F & B Comm. (Adjust, revise)	1. Revised Budget Request 2. Revenue Estimates 3. Ceiling Calculations 4. Consultation - Supts.	1. Final Budget Request	F & B Committee
8	Budget Approval	1. Final Budget Request	1. Approval Budget	Boar

DETAILED PROCEDURE ANALYSIS

AREA: 1.1.1 BUDGET PREPARATION COMPONENT: BUDGET GUIDELINES

OBJECTIVES: 1. Production of Effective Budget Guidelines for Whole System
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Determination of Budget	Previous budget statements based on Code of Accounts	Forms	Budget Categories	Aug. 15	Budget Officer and Superintendent of Finance (Central Office
		Program needs identified through feedback from Schools & Superintendents	Verbal			
		Policy Guidelines (Finance and Budget Committee)	Board Resolution			
2	Sequencing of budget forms	Budget Categories Priority determination		Budget preparation forms (Staff list) (Other components) (Department summary)	Sept. 1	Budget Officer and Superintendent of Finance (Central Office)
3	Preparing instructions	Budget forms		Instructions	Sept. 15	Budget Officer and Superintendent of Finance (Central Office)

DETAILED PROCEDURE ANALYSIS

AREA: 1.1.2.1 BUDGET PREPARATION COMPONENT: SCHOOL REQUESTS FROM FIELD OFFICE

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Prepare description of Budget Categories and Instructions	Previous Budget Documents Directives from Central Office		Description documents	Oct.	Field Supt.
(a)	Set upper limit on cap. current and replacements	Board per pupil and allocation policy Enrollments (current Conditions & Needs of Individual Schools	Planning Budget Schools Schools	Part of Description Document	Oct.	Field Supt.
2	Cap. Current & Replacement and Supplemental Budget prepared by schools	Description Document		Requests + % of allocable to non-allocable of Cap. Currents (Purchase Requisition Form)	A.N.A. after Jan.	School Principal
3	Meeting of Field Supt. with Principals for clarification, etc.				Oct. (ca. 1 week after description sent out)	

DETAILED PROCEDURE
ANALYSIS

AREA: 1.1.2.1 BUDGET PREPARATION (Cont'd) COMPONENT: SCHOOL REQUESTS FROM FIELD OFFICE

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
4	Requests from school generated at any time and reviewed by Supt. or designate (Admin. Assist.) (upto 50%)	Request from school Upper limits Educational relevance to program	School; Field Office Allocations. School & Field Office	Requisition	A.N.A.	School and
4(a)	Non-allocable requests--to Construction Dept.	" " + Rationale for need		Request for Estimate to Construction Department	4 Mons. lead-time	
4(b)	Major Requests to Supt. of Plant	+ Rationale for need				
5	Requests over 50% and Supplemental held until Budget Approval		Field Office			
6	Consider Requests over 50% of Budget--Approved Subject to Board Approval	Budget Approval by Board	Board	Requisitions out automatically	A.N.A. Following Budget Approval by Board (Spring)	
6(a)	Consider Supplemental Requests	Budget Approval by Board Budget Balance (incommitted)	Board Field Supt.	Requsiitions for Approval items	Following Budget Approval by Board (Fall)	

DETAILED PROCEDURE ANALYSIS

AREA: 1.1.2.2 BUDGET PREPARATION COMPONENT: SCHOOL REQUESTS

OBJECTIVES: 1. 2 - Prepare budgetary requests based upon budget allotment from Superintendent
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
	Cap-Current Requests:					
1	Identification of needs department.			Department		
2	Formulation of School list of Priorities.			School Administrative Team		
3	Submission to Superintendent.	Requisition Form				
4	Review of Submission by Superintendent.			Superintendent	when budget approved	
	Special Requests:					
1	Request by Principal to Superintendent.	Requisition Form			immediately	
	Maintenance Requests:					
1	Request by Principal to Superintendent.	Requisition Form			immediately	
	Supplies:					
1	Principal allots budget.				when budget approved	
2	Department make requisitions.	Requisition Form				

DETAILED PROCEDURE ANALYSIS

AREA: 1.1.3 BUDGET PREPARATION **COMPONENT:** 3(a) PREPARE AREA REQUESTS

OBJECTIVES
1. Preparation of Field Office Budget Requests
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Description and Definition of Budget Categories Preparation	Previous Budget Documents Directives from Central Office	Field Office Central Office (Keith)	Description Document	Oct.	Field Office Supt.
2	Departments of Field Office Complete Forms	Description Document Assessment of Need: (a) Past Budget (b) Current experience (c) Projection of needs	Dept. Personnel (Field Office)	Standard Budget Form	Oct.	Field Office Personnel
3	Discussion and clarification of rationale for requests with Superintendent	Standard Budget Forms	Dept. Personnel & Supt.	Final Department Budget Request (Standard Form)	Oct.	Field Office Personnel & Supt.
4	Collation into Field Service Budget & Establish Priorities	Department Budget Requests (Final)		Field Office Request (Standard Form) Brief for Rationale of Budget Request	Nov. (early)	2 Supts. & Admin. Asst. (Field Office)

DETAILED PROCEDURE ANALYSIS

AREA: 1.1.4 BUDGET PREPARATION

COMPONENT: DEPARTMENT REQUESTS

OBJECTIVES:
1. Completion of Form BD1(a), BD1 and BD2(a)
2. Establishment of priorities
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Determine staff Requirements	-Current Staff List	Staff file	BD1(a) completed	Oct.	Dept. Head
		-Number of New Schools	Board Minutes			
2	Complete Form BD1	BD1(a)		BD1 completed	Oct.	Dept. Head
		-Previous Years Budget -Expenditures to-date	Approved Budget Printout			
		-Anticipated inflation	Business Publications and supplies			
		-Anticipated needs	Age of equipment New projects current state of equipment			
3	Complete Form BD2(a)	BD1, BD1(a)		BD2(a)	Oct.	Dept. Head
4	Establishment of Priorities	-Board priorities	Supts.	Justification of expenditure to Superintendent	Oct.	Dept. Head
		-Job performance Environmental Requirements	Job descriptions			
		-Budgetary requests	BD1(a) BD1, BD2(a)			

DETAILED PROCEDURE ANALYSIS

AREA: 1.1.5 BUDGET PREPARATION COMPONENT: SUPERINTENDENT REQUESTS

OBJECTIVES:
1. Completion of Form BD-2
2. Allocation of Priorities
3. Recommended Deletions

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Compare area superintendents request with previous year	Area Supts. request Prev. years budget Projected growth or decline in students and staff Analysis of per pupil costs and % of budget	Area Supt. BD-1 etc Budget Office Plan Dept.	Approval, rejection or modification by Supt.	Dec.	Central Office
2	Submission of BD-2(a) to Budget Dept. for inclusion in draft budget	Back-up material from Budget forms BD-11 etc.	Supt.	For compilation into draft budget	Jan.	Central Office
3	Consideration of draft Budget	All budget documents	Budget Office	Submission of budget to Admin. Council and Staff Budget Comm.	Feb.	Central Office
4	Establishing priorities when reductions are required	Directive from Admin. Council on % or dollar reductions and from staff budget committee (specific suggestions re cuts)	Admin. Council Staff Budget Ctte.	Draft Budget recommended to Finance Committee	Feb.	Central Office

DETAILED PROCEDURE ANALYSIS

AREA: 1.1.6 BUDGET PREPARATION COMPONENT: TOTAL BUDGET COMPILATION

OBJECTIVES: 1. Production of Total System Budget
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Check Budget Submissions for accuracy	Budget Forms Staff Lists Payroll and Accounting Records		Corrected Budget Summaries	Nov. 1	Budget Officer & Superintendent of Finance (Central Office)
2	Compilation of summaries into a Total Budget	Corrected Budget summaries		Total Budget Request (Expenditure Summary)	Nov. 15	Budget Officer & Superintendent of Finance (Central Office)

DETAILED PROCEDURE ANALYSIS

AREA: 1.1.7 BUDGET PREPARATION COMPONENT:

OBJECTIVES:
1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	General Budget Overview Compilation	1. Budget Request 2. Consultation (at meeting) 3. Revenue Estimates 4. Ceiling Calculations	Budget Summary Form--Keith Verbal Accounting Dept (based on Min. Forms)	General Budget Overview	Jan. 31	Supt. Finance & Budget Officer
2	Examination of priorities	General Budget overview Consultation of Supts., etc.		Priorities established	Feb. 7	Admin. Council
3	Revisions of General Budget Overview	Priorities General Budget Overview Consultation, etc. Salary Schedule Commitments		Revised Budget Request	Feb. 14	Admin. Council

DETAILED PROCEDURE ANALYSIS

AREA: 1.1.8 BUDGET PREPARATION COMPONENT: 7 & 8* BUDGET REVIEW & APPROVAL

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Review of priority listings listings and resulting revised budget request	1. Revised Budget Request 2. Revenue 3. Ceilings 4. Consultation		Recommend final Budget Request to Board	Feb. 21	F & B Committee
		Priority Listings	Admin. Council			
2	Examination of Final Budget to Board	Final Budget Request	Admin. Council	Approved Budget	Feb. 28	Board

*This year, steps 7 and 8 will be at one meeting of full Board + F & B Committee, so Board can vote approval at that meeting.

MANAGEMENT AREA: 2.1 ACCOUNTS PAYABLE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Process invoices for payment by computer systems cheque	Purchase Orders (copies) Invoices Receiving Reports Batches to Computer Vendor Numbers	Edit lists from computer Cheque Registers Cheques Vendor Listings Outstanding Purchase Order lists Information for Budget Reports and Financial Statements	A/C Payable Staff A/C Payable Clerks Chief Accountant Purchasing Dept. Budget Schools Admin. Staff Geac Suppliers
	Process Cheques Requisitions re: Petty Cash reports Mileage Claims Expense Claims Other Claims by computer systems cheques	Standard forms Batch to computer	Same as above and integrated in edit lists, etc.	As above
	Manual Cheques by Typewriter	As above	As above	As above

MANAGEMENT AREA: 2. 2 ACCOUNTS RECEIVABLE AND REVENUE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Misc. Revenue Recovery of damages costs Sale of Equipment Sale of Bldgs./sites Interest Earned Cafeteria Revenue	Memos, Forms Batchs to computer	Official Receipts: Bank Statements Edit lists from Computer Revenue portion of financial statements Reports to Ministry	Accounting Dept. A/C Rec. Cashier Accountant Chief of Account Schools Admin. Staff Ministry
	Tuition Fee Revenue Continuing Education Driver Education Summer School Winter courses Day School	Fees and forms from various sources	As above Invoices to Students	As above
	Rental Billing and Revenue Schools & Facilities	Rental Permits Caretakers overtime reports Revenue from Rentals	Invoices for rental Official receipts Billing Summaries Journal entries	Area Business Offices Regional Business Officer and staff as above
	Grants Provincial	Regulations, form work sheets Assessment Information Enrolment Information	Grant calculation forms portion of financial statements - Current Estimates for next year	Accountant Ministry, Revenue Assess, Office Admin. Staff
	Requisitions to municipalities New Year	Assess. Information Ministry Regulations Working papers from Ministry Previous year Financial statements	Estimates for year Requests to Municipalities for new year	Accountant Municipalities

MANAGEMENT AREA: 2.3.1 GENERAL ACCOUNTING - OPERATING FUNDS

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Daily Borrowing	Accounting Records re: Deposits, Cheques issued, etc.	Promissory Notes to Bank	Accountant
	Journal Entries	Bank Debits Corrections Adjustments Batches to Computer Cheque Cancellations Systems Cheque issued	Computer Edit Lists	Budget Dept. A/C Payable Cashier A/C Rec. Accountant
	General Ledger Account Analysis	Computer Print-out of Trial Balances and Transactions	Corrections Journal Entries Back-up re: Financial Statement and year end	Accountant
	Bank Reconciliations	Cheque cashed through bank A/C Payroll Registers A/C Payable Registers	Reconciliation Statements	A/C Rec. Cashier Accountant

MANAGEMENT AREA: 2.3.2 GENERAL ACCOUNTING - CAPITAL

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Capital Accounting for all Capital Projects financed by Debenture	Board resolutions re: Projects approval Borrowing Debentures Requests for payment for contract drawings, architect fees, etc. P.O.s for equipment, etc. Invoices for payment	O.M.B. Applications O.E.C.A. Applications Debentures Bank Borrowing Cheques Capital statements Trial Balances & General Ledger Transactions from Computer	Planning Dept. Construction & Design Supt. of Plant Supt. of Finance Supt. of Admin. Services Capital Accountant Chief Accountant

OVERVIEW

MANAGEMENT AREA 2.4 PAYROLL

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Preparation of all input to Computer relative to issuing Salary Cheques	Reports and forms from Personnel Dept. Overtime reports, Absentee reports, Casual employee time reports Various other reports and Standard Forms	Salary Cheques T4 Slips Various Reports	All Employees Payroll Staff Supervisor
	123			124

MANAGEMENT AREA: 4.1 ACCOMMODATION SUPPLY: CAPITAL PROGRAM

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Monitor Planned Development	1. Developer's brief 2. Plan for Sub-Div. registration 3. Facilities inventory	11. Facility Needs 12. Site Analysis	Planning
	Site Selection	1. Facility Needs (A. 11) 2. Site Analysis (A. 12) 3. Inventory of Sites	11. Site Designation Agreement 12. Site Selection 13. Site Purchase Agreement 14. Ministry Approval (a) site (b) purchase 15. OMB Approval (financing)	Planning
	Establish Capital Program	1. Facility Needs (A. 11) 2. Demographic Stats 3. Current Enrolment 4. Facilities Inventory (A. 3) 5. Facilities standards 6. Enrolment Projections 7. Reliable/replacement needs 8. Ministry guidelines 9. Available architects	11. Project briefs 12. Capital Program (a) Project descriptions (b) Priorities (c) Cost est. (d) Need justification (e) Architects (f) F & E est. (g) Approvals	Planning
	Project Proposal	1. Project briefs (C. 11) 2. Capital Program (C. 12)	11. "Co-op Needs" study 12. Facility Proposal 13. Cost Est. 14. Ministry Approval 15. OMB Approval	Planning/ Buildings

nt'd.

MANAGEMENT AREA: 4.1 ACCOMMODATION SUPPLY: CAPITAL PROGRAM (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Construction	1. Construction Cost (G. 13) 2. F & E Specs. & Costs (G. 14) 3. Contract (G. 15) 4. Working Drawings (F. 11) 5. Construction Specs. (F. 12) 6. Ministry Approval (a) site (b) purchase (B. 14) 7. OMB Approval (financing) (B. 15) 8. Building Permits	11. Construction Schedule 12. Inspection Reports 13. Payment Approvals 14. Cost Control Statements	Buildings

DETAILED PROCEDURE ANALYSIS

AREA: 4.1.1 ACCOMMODATION SUPPLY - CAPITAL PROGRAM COMPONENT: MONITOR HOUSING DEVELOPMENT

OBJECTIVES: 1. ______
2. ______
3. ______

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Project student yield (Greeniaus)	Housing yield factors	Local Planning Board			Planning
2		Draft Plan of subdivision	Ministry of Housing			Planning
				Projected Yield	as required	
				Comment on Draft Plan (Letter)	"	Planning
2	Facility Needs Analysis	Projected Yield	Planning Yield Projectn			Planning
		Current Enrolment Family of Schools	Schools			Planning
		Enrolment Projection (3 yr)) Available facilities)	Planning			Planning
		List of Proposed/Reg. Subdivisions	Ministry of housing Munici.			Planning

DETAILED PROCEDURE ANALYSIS

AREA: 4.1.1 ACCOMMODATION SUPPLY - CAPITAL PROGRAM COMPONENT: MONITOR HOUSING DEVELOPMENT

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Project student yield (Greeniaus)	Housing yield factors	Local Planning Board			Planning
2		Draft Plan of subdivision	Ministry of Housing			Planning
				Projected Yield	as required	
				Comment on Draft Plan (Letter)	"	Planning
2	Facility Needs Analysis	Projected Yield	Planning Yield Projectn			Planning
		Current Enrolment Family of Schools	Schools			Planning
		Enrolment Projection (3 yr)) Available facilities)	Planning			Planning
		List of Proposed/Reg. Subdivisions	Ministry of housing Munici.			Planning

DETAILED PROCEDURE ANALYSIS

AREA: 4.1.2.1 ACCOMMODATION SUPPLY COMPONENT: SITE PURCHASE

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Prepare site purchase Res'n (Greeniaus)	Site Purchase Agreement Appr'd Capital Allocation (site $) Project Proposal	Greeniaus Ministry of Education Design & Const.	Site Purchase Resolution		Planning Planning Planning
2	Approval of Site Purchase (Board)	Site purchase resolution	Planning	Approved Site Purchase resolution		Board
3	Commission site appraisal	Approved site purchase resolution	Planning	Site Appraisal		Planning Appraiser
6	Prepare Instructions to Lawyer	Approved site purchase resolution		Legal Documentation		Lawyer
4	Prepare OMB application (Chief Accountant	Approved Site Purchase resolution		Request for $ OMB Application to approve site purchase		Lawyer Finance
5	OMB Approval to Purchase	Application to OMB	Finance	OMB Approval to purchase site		OMB

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DETAILED PROCEDURE ANALYSIS

AREA: 4.1.2.1 ACCOMMODATION SUPPLY COMPONENT: SITE PURCHASE (Cont'd)

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS, LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
7	Arrange Temp. Financing	Request for $ OMB Approval to Purchase site	Lawyer	Bank Loan		Finance
8	Purchase Site	Legal Documentation Bank Loan	Finance	Deed to Site		Lawyer

DETAILED PROCEDURE ANALYSIS

AREA: 4.1.3 ACCOMMODATION SUPPLY COMPONENT: ESTABLISH CAPITAL PROGRAM

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Project Enrolment (Planning)	Projected Yields from new development	Greeniaus	3-Year Enrolment Projection	Twice	Planning
		Current Birth Rates	Regional Ass. Off			
		School Projections	Prin.			
		Current 3-year Projection	Planning			Supt. of Famil Planning
		Available Facilities	"			
		Current Enrolment (Separate)	Separate Sch. Bd.			
		Current Enrolment (Public)	Princ.		Monthly	Planning
2	Estimate Cap	Facility Needs	Planning			Planning
3	Costs, Establish Priorities	Site Purchase Agreements Grant Regulations (const. $, F/E $)	Ministry of Education	Facility Needs Cost Estimate Facility Needs Priority Ranked 5-Year Cap Space Forecast	July-Sept.	Planning
4	Prepare Interim Cap. Program (P & B Committee)	Preliminary Cap. Program Current Enrolments (Public) Enrolment Projections List of Approved Arch.	O & C	Interim Cap. Program		

DETAILED PROCEDURE ANALYSIS

AREA: 4.1.3 ACCOMMODATION SUPPLY

COMPONENT: ESTABLISH CAPITAL PROGRAM (Cont'd)

OBJECTIVES:
1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
5	Approval: Interim Cap. Program (Board)	Interim Cap. Program		Approved Interim Cap. Program		
7	Prepare Capital Program (Planning & Bldg. Comm.)	Preliminary Cap. Prog. Interim Cap. Program Current Enrolments (Public) List of Approved Arch.		Proposed Cap. Program		
8	Approval of Cap. Program (Board)	Proposed Cap. Program Board Revisions	 Board	Approved Cap. Program		
	Approval of Cap. Program (Ministry)	Approved Cap. Program (Board)		Approved Site Allocation Approved Bldg. Allocation		Ministry of Education
6	Prepare	Approved Interim Cap. Program	Board			
9	Project Briefs (Supt.-Families)	Approved Cap. Program General Specs.: Educational	Board	Project Briefs		Planning

DETAILED PROCEDURE ANALYSIS

AREA: 4.1.4 ACCOMMODATION SUPPLY COMPONENT: PROJECT PROPOSAL

OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Prepare coop Needs (Planning)	Cap. Program (Interim or Final) Project Brief Needs Analysis Current Enrolment (Pub.) Current Enrolment (Sep.) Enrolment Projections Population Age Distri.	Munic.	Cooperative Needs Study (Form)		Planning
2	Prepare Building Proposal (Design and const.)	Capital Program (Interim or Final) Project Brief Site Detail Con'l Specs: Educ. Capital Grands Plan	Ministry	Building Proposal (Form) Site Detail Utility Requirements Building Detail and Notification		
3	Prepare Project Proposal (Planning)	Coop. Needs Study Building Proposal		Project Proposal		
4	Project Proposal Approval (Ministry)	Project Proposal		Approved Project Proposal		
5	Establish Prov. Acct. (Finance)	Approved Proj. Proposal	Planning	Project Acct.		
7	Commission site Survey (D & C)	Site Detail	D & C	Site Survey		Surveyor

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Cont'd.

DETAILED PROCEDURE ANALYSIS

AREA: 4.1.4 ACCOMMODATION SUPPLY COMPONENT: PROJECT PROPOSAL (Cont'd)

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
8	Establish Site Development Requirements (D & C)	Site Survey Building Proposal		Site Development Requirements (To Architect)		Surveyor
9	Instruct Architect	General Instructions to Architect	D & C	Confirmation of Commission Instructions to Architect Project Brief		
		Site Development Requirements				
		Site Survey				
		Site Detail				
		Project Brief	Planning			
		Name of Architect				
		Unit Cost Guidelines				
		Required Date of Occupancy	Planning			
		Project Supervisor	D & C			

DETAILED PROCEDURE ANALYSIS

AREA: 4.1.5 ACCOMMODATION SUPPLY COMPONENT: DESIGN I - SKETCH PLANS

OBJECTIVES:
1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Approve Arch./Eng. Consultants (D & C)	List of Proposed Arch./ Eng. Consultants	Arch.	Approved list of arch./eng. consultants		D & C
2	Prepare Sketch Plans	Approved Consultants Various buildings standards (const., health, etc.) Consultation-Bd. Staff Consultation-Pks./Rec. Library Board	 Various agencies Board Pks/Rec. Lib. Bd.			 Architect Bd.-Arch. Architect
3	Sketch Plan	Sketch Plans				
4	Approval (1) P & B Comm (2) Board			Approved Sketch Plans		Board
5	Update Needs Study (Planning)	Approved Sketch Plans Current Enrolments Coop Needs Report		Enrolment Projection for new school		Planning
6	Prepare Ministry Submission	Approved Sketch Plans Enrolment Prjection Capital Grants Plan Reference Const. Costs	 D & C	Sketch Plan Submission 1-Sketch Plans 2-Projections 3-Cost estimates		D & C

DETAILED PROCEDURE ANALYSIS

AREA: 4.1.6 ACCOMMODATION SUPPLY COMPONENT: DESIGN II - WORKING DRAWINGS

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Prepare Working Drawings Constr. Specs. (Architect)	Approved Sketch Plans (Board and/or Ministry) Fire Marshalls Requirements Recommendation--other agencies	D & C Fire OWR Health Environ.	Working Drawings/const. specs Approvals--other Agencies Approvals--Fire Marshalls Notification Required Fire Revisions		Architect
4	Approval - Working Drawings Constr. Specs. (Board)	Working Drawings/Specs Approvals--other Agencies		Approved Drawings/Specs.		
5	Update Needs Study (Planning)	Notification of approval of working/ drawings Coop Needs Study Current Enrolments	Board	Enrolment Projection		
6	Prepare Ministry Submission	Approved Drawings/Specs Enrolment Projection		Working Drawings Submission (to Ministry)		

DETAILED PROCEDURE ANALYSIS

AREA: 4.1.7 ACCOMMODATION SUPPLY COMPONENT: FINAL PROJECT APPROVAL

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Call Tenders (D & C)	Approved Drawings/Specs Standard Tender forms/ Procedures	Ministry D & C	Tendered Bids		D & C Contracts
2	Analyse Bids (D & C)	Tendered Bids	Contracts	Recommend Contractor		D & C
3	Board Approval of Contract	Recommendations	D & C	Approved Contract		
4	Final Update Needs (Planning)	Approved Contract Coop Needs Study Current Enrolments		Enrolment Projection		D & C
5	Prepare Ministry Submission (D & C)	Approved Contract Enrolment Projection		Final Project Submission		D & C
6	Ministry Approval (Ministry)	Final Project Submission		Approval of Project		

MANAGEMENT AREA: 5.1 PLANT OPERATIONS AND MAINTENANCE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Operations	Budget Supervisor of Maintenance & Operations Area Supervisors of Maintenance & Operations Caretaking Staff	Ensuring cleanliness and efficient operations of Physical Plant and Grounds	

OVERVIEW

MANAGEMENT AREA: 5.2 PLANT OPERATIONS AND MAINTENANCE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Central Cap/Current Projects	Budget Principals and Field Superintendents Maintenance Dept.	Various capital improvements to Buildings & Grounds	

DETAILED PROCEDURE ANALYSIS

AREA: 5.1.3 PLANT OPERATIONS COMPONENT: PREPARATION OF DEPARTMENT BUDGET REQUEST

OBJECTIVES: 1. ________

2. ________

3. ________

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Determine salary cost of present personnel	Payroll print-out	Payroll	Total committed salary cost	Oct. 31	Supervisor (Maintenance & Operations)
2	Determine future personnel requirements and salary costs	List of new facilities Date of completion	New Design & Const.	List of new personnel required and salary cost	Oct. 31	Supervisor (M & O)
3	Determine supply requirements for future facilities	Monthly budget print-out	Computer Service	Total committed supply cost and inflation factor	Oct. 31	Supervisor (M & O)
4	Determine supply requirements for future facilities	List of new facilities Date of completion	New Design & Const.	Total supply cost for future growth, including inflation	Oct. 31	Supervisor (M & O)
5	Determine equipment to be replaced	Survey report on existing equipment	Area Supervisors	Total cost of replacement equipment	Oct. 31	Supervisor (M & O)
6	Determine new equipment needed	Survey report on existing equipment	Area Supervisors	Total cost of new equipment needed	Oct. 31	Supervisor (M & O)
7	Determine cost of sundry smaller budgets	Monthly budget print-out	Computer Service	Total committed cost plus inflation	Oct. 31	Supervisor (M & O)
8	Determine committed cost of contractual services	Department Records	Sec.	Total committee cost plus inflation	Oct. 31	Supervisor (M & O)

DETAILED PROCEDURE ANALYSIS

AREA: 5.1.3 PLANT OPERATIONS (cont'd) **COMPONENT:** PREPARATION OF DEPARTMENT BUDGET REQUESTS

OBJECTIVES: 1.

2.

3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
9	Determine contractual services required for growth	List of new facilities Date of completion	New Design & Const.	Total cost of future contractual services	Oct. 31	Supervisor (M & O)
10	Prepare detailed budget forecast	All input previously listed	Dept. Records	Total budget forecast	Oct. 31	Supervisor (M & O)

MANAGEMENT AREA: 5.2 PLANT OPERATIONS AND MAINTENANCE - MAINTENANCE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
2	Maintenance of all Physical Plan and grounds	Supervisor of Maintenance & Operations Teaching Staff Caretaking Staff Asst. Supervisor Maintenance (Planned Maintenance) Maintenance Budget	Preservation of Capital Assets	

MANAGEMENT AREA: 5.2 MAINTENANCE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
5.2.1	Project Request	1. Breakdown Notification 2. Cap-Current (Family) Request 3. Maintenance Programs (a) Programmed Maintenance (b) Cap-Current (Cent) 4. Capital Programs Sub-Contracts	Project File	Supervisor of Maintenance Engineering
5.2.2	Project Investigation	Project File (P.F.)	1. Project Authorization OR 2. Request for Authorization OR 3. Item for next year's Budget Consideration	Supervisor of Maintenance Engineering
5.2.3	Project Authorization (optional)	Request for Authorization	1. Project Authorization OR 2. Item for next year's Budget Consideration	Originator of Project Request
5.2.4	Design, Contract	Project Authorization (from P.F.)	1. Project Specs/drawings 2. Award of Contract(s) (where appropriate)	Maintenance Engineering Dept.
5.2.5	Project Schedule	1. Specs/drawings 2. Contract award(s) (from P.F.)	1. Work Order 2. Work Schedule (P.F.)	Purchasing Dept. Maintenance Engineering
5.2.6	Carry Out Works	1. Specs/drawings 2. Work Order 3. Work Schedule (P.F.)	1. Signed-off Work Order 2. Authorize final payments 3. Closed-out Project File	Maintenance Engineering
5.2.7	Budget Preparation		Maintenance Programs, Budgets	

DETAILED PROCEDURE ANALYSIS

AREA: 5.2.7 PLANT MAINTENANCE

COMPONENT: PREPARATION OF DEPARTMENT BUDGET REQUESTS

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Determine salary cost of present personnel	Payroll print-out	Payroll	Total committed salary cost	Oct. 31	Supervisor (Maintenance & Operations)
2	Determine future personnel requirements and salary costs	List of new facilities Date of completion	New Design & Const.	List of new personnel required and salary cost	Oct. 31	Supervisor (M & O)
3	Determine supply requirements for future facilities	Monthly budget print-out	M.S.K.	Total committed supply cost and inflation factor	Oct. 31	Supervisor (M & O)
4	Determine supply requirements for future facilities	List of new facilities Date of completion	New Design & Const.	Total supply cost for future growth, including inflation	Oct. 31	Supervisor (M & O)
5	Determine equipment to be replaced	Survey report on existing equipment	Area Supervisors	Total cost of replacement equipment	Oct. 31	Supervisor (M & O)
6	Determine new equipment needed	Survey report on existing equipment	Area Supervisors	Total cost of new equipment needed	Oct. 31	Supervisor (M & O)
7	Determine cost of sundry smaller budgets	Monthly budget print-out	M.S.K.	Total committed cost plus inflation	Oct. 31	Supervisor (M & O)
8	Determine committed cost of contractual services	Department Records	Sec.	Total committed cost plus inflation	Oct. 31	Supervisor (M & O)

DETAILED PROCEDURE ANALYSIS

AREA: 5.2.7 PLANT MAINTENANCE (Cont'd) COMPONENT: PREPARATION OF DEPARTMENT BUDGET REQUESTS

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
9	Determine contractual services required for growth	List of new facilities Date of completion	New Design & Const.	Total cost of future contractual services	Oct. 31	Supervisor (M & O)
10	Prepare detailed budget forecast	All input previously listed	Dept. Records	Total budget forecast	Oct. 31	Supervisor (M & O)

MANAGEMENT AREA: 6.1 TRANSPORTATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Prepare invitation to tender school and disseminate instructions, etc.	1. School boundaries 2. Transportation Policy - regular students - special - winter bus (additional) - Home Ec. & Ind. Arts - kindergarten - summer school	1. Procedures for schools - forms - instruction	Business Officers
2	Prepare list of pupils eligible for transportation	School O.S.R.	List of pupils eligible for transportation	School
3	Plot pupils	List of pupils eligible for transportation	Plotted pupils (map)	Business Officers
4	Design Routes	Plotted pupils Bus loading factors	Designed routes	Business Officers
5	Determine number of buses	Designed routes	Estimate buses by route	Business Officers
6	Analysis of Tenders	Number of Buses Submitted tenders List of Contractors	Transportation tender spec. Recommended tenders	South Business Officer and Admin. Council
7	Tenders	Submitted bus tenders (Board accepts/rejects)	Recommendations	Business Officers
8	Transportation Contracts Awarded (promised)	Recommended Tenders	Contracts Awarded (promised)	Board
9	Bus Routes Designated	Awarded Transportation Contracts	Distribution of Bus Routes	Business Officers
10	Adjustments of bus routes (extra buses)	Additional student enrollment	Distribution of Bus Routes	Business Officers

DETAILED PROCEDURE ANALYSIS

AREA: 6.1.1 TRANSPORTATION COMPONENT: REGULAR BUSING

OBJECTIVES: 1. Determination of Student Eligibility for Busing
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	STUDENT ELIGIBILITY					
1.1	Map changes in school boundaries (if any)	School Boundary changes	Board Minutes	Updated school and road network map	Anytime in year	
1.2	Establish 2-mile limit for each school (on map)	Updated schools map	As above	Mapped 2-mile limit	"	
1.3	Compile lists (by school) of streets eligible for transportation	Mapped 2-mile limit	"	List of streets eligible for regular transportation, (by school)	Jan-Mar.	Distribute to School Principals
1.4	Update Transportation Policy instructions to schools (if any)	Changes in transportation policy	"	School Transportation policies forms (1), instructions to schools	"	
1.5	Prepare request for Home Ec. & Ind. Arts schedule	List of schools with H.E. & Ind. Arts Facilities, changes in policy	Files, Board Minutes	Request for Home Ec. & Ind. Arts Sept. schedule	"	
1.6	Plot students on road map	Completed school lists (or maps) of students eligible for transportation - grouped either (by street preferrably) of alphabetically	School Principals	Maps showing distribution of students eligible for transportation	Mid-Apr.	

DETAILED PROCEDURE ANALYSIS

AREA: 6.1.2 TRANSPORTATION COMPONENT: REGULAR BUSING COMPLETED BY

OBJECTIVES: 1. Route Design
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION[1]	SOURCE[2]	DESCRIPTION[3]	TIMING[4]	
1	Design bus routes (1) Secondary (2) Elementary Optimize bus usage determine number of buses required	a) Plots of eligible students b) Current routes c) Route timing information (experience usually) d) Bus loading factors e) Transit timetables, maps	Above Files	Initial Design of Routes - route maps - number of buses required - number of students per bus	End of July	
2	Compile Master Routes, Allocate Bus Privilege Cards Allocate Transit Tickets (Secondary)	a) Output of 2.1 b) Provisional designated routes & operations	Above Tenders file	Master Routes Bus privilege cards Transit tickets & letters	End of August	To school Principals
3	Adjustment of Routes (because of increased quantity translents or immigration)	Master Routes		Adjusted Master Routes	Sept.	Designated Operators
	- add new routes if required - inform operators - distribute extra Bus Privilege Cards	Excess students on buses	Driver survey	Information re new routes	End of Sept.	

DETAILED PROCEDURE ANALYSIS

AREA: 6.1.3 TRANSPORATION COMPONENT: REGULAR BUSING

OBJECTIVES: 1. Transportation Contract Negotiations
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Prepare invitation to tender for bus contracts	List of bus operators Previous years' conditions of tendering	Files	Conditions of tendering Application forms	Early March	Advertise & to current bus operators
2	Analysis of Tenders	Operators' Tenders Current contracts Records of Operators' previous service and performance	Operators Files "	Recommended Tenders (Operators & number of buses)	Early April	
3	Contracts Awarded & Bus Routes Designated	Recommended and approved tenders	Board Decision	Notification of accepted tenders and provisional routes designated	End of April	Tendering to Operators
4	Adjust Accounting on Contracts (after route modifications)				End of Sept.	
5	Contracts Finalized	Provisional contracts and adjustments	Files	Final Contracts	End of Sept.	To bus operators

DETAILED PROCEDURE ANALYSIS

AREA: 6.1.4 TRANSPORTATION COMPONENT: REGULAR BUSING

OBJECTIVES: 1. Transportation budgeting
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Total Expenditures Estimated and Compared with Projected	Projected Transportation Expenditures (last year)	Files	Estimate of percentage increase in operation prices	Mid-Oct.	
2	Project next year's budget requirements	Estimate of percentage increase in operation prices	above	Budget request for next year		

DETAILED PROCEDURE ANALYSIS

AREA: 6.2 TRANSPORTATION COMPONENT: SPECIAL STUDENTS

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Request special student information from special services				Mid April	
2	Plot all special students	Special class student forms (5), names, addresses, birthdates, home, school Current map	special services resources personnel Files	Plotted special students	July	
3	Design new routes, and/or adjust regular routes (rural)	Current Master routes (regular transportation) Route maps	Files	Route maps and schedules		
4	Draw up drivers' schedules and student lists	Operators' contracts Route maps and schedules	Files	Drivers lists of special students, ie. names, addresses, school, of each	July-Aug.	To each drive on special route
5	Write to all special students giving their instructions for transportation	Special student, names, addresses, routes	step above	Individual instructions to special student - route - timing - operator - bus number - telephone numbers	Mid Aug.	

7

Cont'd.

DETAILED PROCEDURE ANALYSIS

AREA: 6.2 TRANSPORTATION (Cont'd) COMPONENT: SPECIAL STUDENTS

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
6	Update special student lists in accordance with responses to individual letters (previous step)					
	- Cross untraced/moved students off respective bus lists	Correspondence re: changes of address, deceased, etc.	Parents, neighbours, etc.	Updated Special Student		
	- make enquiries of special services to trace such students		Special Services	Enquiries to Special Services	all year	
	- inform operators of changes			Notification of change to bus operator		

DETAILED PROCEDURE ANALYSIS

AREA: 6.3 TRANSPORTATION COMPONENT: KINDERGARTEN

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Plot morning shift Kindergarten students (with the regular students)	Kindergarten Registrations - names - addresses (or map) - shift			April	
2	Regular Route design (see Regular Busing 2.1)					
3	Design take-home routes for morning shift, and afternoon collection and take home routes (if any)			Morning take-home schedules and afternoon pick-up and take-home schedules		
4	Compile Kindergarten students list (or map) for bus drivers			Names, addresses (or map) of all kindergarten students on his route		To each driver

DETAILED PROCEDURE ANALYSIS

AREA: 6.4 TRANSPORTATION COMPONENT: WINTER BUS SCHEDULING

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Establish 1-2 mile limit for each school	Current map with boundaries	Files	Map with 1-2 mile limit plotted	After Sept.	
2	Compile list of streets eligible for winter bus transportation	Output of step 1.		List of streets eligible for winter bus transportation (plus instructions, forms)		To each school with (K-3)
3	Plot eligible students on road map	Lists (or maps) of eligible student names, addresses	School Principal	Plot of eligible students	End of Oct.	
4	Design additional routes or make modifications to regular	Master routes or Bus Maps (3) Current bus contracts awarded	Files	New routes and timing - number of buses required - number of taxis	End of Oct.	
5	Inform contractors and allocate bus privilege cards to schools	New routes, etc.	Step 4 above	Winter bus routes, time and instructions		To school principals & bus and taxi operators

DETAILED PROCEDURE
ANALYSIS

AREA: 6.5 TRANSPORTATION COMPONENT: HOME ECONOMICS & INDUSTRIAL ARTS

OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Allocate Home Economics & Industrial Arts runs to Operators - i.e., lowest bids	Home Economics & Industrial Arts Program Schedule Operator's Tenders for prices tendered	Principal in Home Facility School	Home Economics & Industrial Arts bus routes and timing	April	

DETAILED PROCEDURE ANALYSIS

AREA: 6.6 TRANSPORTATION

COMPONENT: MINISTRY REPORTS

OBJECTIVES:
1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Check and correct ME 301's	ME 301's - Principals Report on Transportation of Pupils	School Principal	Corrected ME 301's	By Oct.31	
2	Summarize ME 301's on ME 302	Corrected ME 301's	Step 2 Above	ME 302 - Board Transportation Summary		To Ministry of Education

MANAGEMENT AREA: 7.1 PERSONNEL DEPARTMENT: ADMINISTRATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS,' LOCATION
7.1.1	RECRUITMENT (Non-teaching staff)	1. Department Staff Requisition 2. Candidates 3. Selection	1. Advertise/Internal Posting 2. Interviews 3. Staff	Superintendents
7.1.2	SALARY ADMINISTRATION - Job Evaluation - Salary Surveys - Interpretation of Salary Schedules	Interview Evaluation Survey Contribution Teacher's Documentation	Job Description Salary Classification Survey Output Teacher's Salary	Evaluation Committee
7.1.3	EMPLOYEE BENEFITS	1. New Employee 2. Insurance Claim, Workmen's Compensation Claim 3. Terminating/Retiring Employee	1. Benefits Documentation- Group Insurance, Pension, OHIP 2. Benefit (if acceptable) 3. Necessary Documentation Pension Cheque	
7.1.4	NEGOTIATIONS	1. Contract Termination 2. Staff Bargaining	1. Statistical Data, Advice 2. Contract	Salary Committee
7.1.5	COLLECTIVE AGREEMENTS	Grievance	Grievance Hearing	
7.1.6	TRAINING AND DEVELOPMENT	Need and Selection of Candidates	Training Seminar/Course	
7.1.7	COMMUNICATIONS AND COUNSELLING	1. Employee Question 2. Change in Legislation or Board Policy 3. Employee	1. Answer 2. Information of Change 3. Counselling	
7.1.8	PERSONNEL RECORDS	New Employee, Terminating Employee	Employee Records + Files	

OVERVIEW

MANAGEMENT AREA: 7.2 PERSONNEL ADMINISTRATION: ALLOCATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Board Policy - Generate Global Figures for staffing for elem., sec., voc., schools	- Student enrolment projections: elementary and secondary by school - formula (board policy)	Global figures of staff needs	Staff Allocation Committee
2	Calculate the distribution of staff for elementary and secondary schools	- global figures of staff needs - secondary school distribution formula - elementary school distribution formula	-Distribution of staff by secondary school -Distribution of staff by family for elementary school	Staff Allocation Committee (S.A.C.)
3	Estimate of staff mobility (Personnel transfers, resignations, retirements)	Requests for transfer - personal - administrative - leave of absence - notices for resignation, termination, retirement - estimates of above - promotion	-Placements of transfers -Estimated Staff movements	Field/CBO
4	Principal determines staff needs	- estimated staff movements - expected enrollments - school - planning department - distribution of staff by secondary school - distribution of staff by family for elementary school	Staff needs	Principals/Field
5	Hiring	- Ad to newspaper - internal postings - applications	- hiring of staff - placement	Principals/Field/ CBO

MANAGEMENT AREA: 8.1 STAFF DEVELOPMENT & RELATIONS - DEVELOPMENT

STEP NO.	DESCRIPTION	INPUT[1]	OUTPUT[2]	PARTICIPANTS/ LOCATION
8.1.1	Liaison with Teacher Training Institutions	Practice Teaching Arrangement	Package	Teacher Education Officer
8.1.2	Board sponsored Ministry of Education courses	Request of: Teachers Principals Superintendents Program Dept.	Recognized Ministry course Teacher Certificate in area of Study	Teachers Program Department External Expertise Ministry of Education P.D. Council
8.1.3	Credit and Non-Credit Board Courses re:			
	(a) New Teachers	Request of: Supt. Curriculum Supt. Families	Orientation package and evening workshops Re: Available resources Corecurriculum Support Services	Coordinators Consultants Teacher Education Officer
	(b) Department Heads	Identification of need for refresher courses for existing Heads and orientation for identified candidates	Program being written	Teacher Education Officer Existing Heads Former Heads
	(c) Leadership Training	Recognition of need Development of System of Identification - Identification Form - Self Education Form	Staff Forums Leadership Development Seminars Role Development Programs Leadership Identification Inventory Assessment of Leadership Candidates	Teachers Supt. Academic Affairs Board

C 'd.

MANAGEMENT AREA: 8.1 STAFF DEVELOPMENT & RELATIONS - DEVELOPMENT (Cont'd)

STEP NO.	DESCRIPTION	INPUT[1]	OUTPUT[2]	PARTICIPANTS/ LOCATION
8.1.3	(d) Substitute Teachers	Advertisement of Positions Signing of Contract Issuance of Temporary I.D. Card	In-service Programs Permanent I.D. Card	Teacher Education Officer Supt. of Schools (Program)
	(e) Parent Volunteers	Parent In-service Principal In-service Teacher In-service	Guidelines	Volunteers in schools Committee
8.1.4	In-service and Workshops	Request of school(s) new program Professional Activities	Workshops Related Materials Ongoing Assistance	Supt. (Program) Coordinators Resource Teachers
8.1.5& 8.1.6	Development of Local Program (Supplemental of Study Committees)	Request of: Teacher(s) Grade Division School Family	In-service Materials	Program Dept. Teachers outside Expertise
8.1.7	Liaison with Community Industry	Meeting with school, commercial and industrial representatives	Work experience Programs	Individual School Technical & Comm. Directors Businessmen P.D. Council
8.1.8	Liaison with Teachers' Federations	Requests from Members of P.A. Council	Coordination of Professional Activity Days on Regional Basis	P.D. Council O.S.S.T.F Education Assn. Sheridan College Liaison Committee
8.1.9	Professional Activity Days	Board Teachers Federation Program Department	Professional Activities	

MANAGEMENT AREA: 8.2 STAFF DEVELOPMENT & RELATIONS: RELATIONS

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
8.2.1	Board Policies and Regulations	Policies and Regulations	Dissemination of information to all staff	Staff of - Board Offices - Schools - Maintenance Areas - Personnel Dept. - Learning Centres
8.2.2	Appointment of Administrative and Supervisory Personnel	O.P. Staff 4 Policy 21 Operating Procedures 4, 5, 11	Advertisement Interviewing Hiring Placement	Trustees Supervisory Officer Principals Search Committee Interview Committee
8.2.3	Appointment of Principals, V.P., Coordinators, Consultants and Related Positions	Vacancy New Position O.P. Staff 4 P. 21	Hiring Promotion Placement	Candidate Interview Committee Director Board
8.2.4	Courses, Conventions, Seminars for Staff	Policy 10	Schedules Circulated Programs Organized Participants Identified Facilities Arranged	All Staff
8.2.5	Leaves of Absence (i) Educational Improvement (ii) Exchange or Loan (iii) Maternity	Identify Participants Policy — Application Form p. 13 — O.P. 8 p. 14 — O.P. 8 O.P. 8	- Leave, Exchange, Loan or Refusal - Need for Replacement	Supt. of Academic Affairs Educational Improvement Committee Supt. Academic Affairs Board

(cont'd)

MANAGEMENT AREA: 8.2 STAFF DEVELOPMENT & RELATIONS: RELATIONS (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
8.2.6	Twenty-Five Year Club	Study of Service Recognition p. 39	Annual Budget	Trustees Supervisory Officers 25 Year Club Members
8.2.7	Staff (i) Campaigning for Public Office (ii) Election to Public Office	p. 34 p. 34	-Approval or Rejection of Leave -Terms of Reappointment -Procedure to fill vacancy	Teacher Employee Board
8.2.8	Conflict of Interest	Education Act Policy 8	Resolution	Supervisory Officers Board
8.2.9	Retirement Allowance Age	Policy 29 O.P. 19 Policy 28	Retirement Board Approval Replacement Need	Retiree Board
8.2.10	Payment of Employees in event of Death	Policy 25 Death of Employee	Payment to Estate	Admin. Services Personnel Dept. Board
8.2.11	General Absence	p. 22, O.P. 8		
8.2.11.1	Sick Leave (Admin. & Non-teaching)	p. 32	Leave Granted	Employee Doctor
8.2.11.2	Holiday Allowance	p. 19, Arrangements with Supervisor	Holiday	Employee Board
8.2.11.3	Temporary Appointments to positions of Greater Responsibility	p. 36, Reg. 1 & 2	Appointment	Candidate Supervisor Board

MANAGEMENT AREA: 8.2 STAFF DEVELOPMENT & RELATIONS: RELATIONS (cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
8.2.11.4	Student to Staff Ratio	p. 35	Ratio Established	Committee Board
8.2.11.5	Financial Assistance to Teachers on Exchange Serving in Peel Schools	p. 17	Financial Assistance	Candidate Board
8.2.11.6	Maternity Leave	O.P.8	Leave	Teacher Supervisor Principal

1

MANAGEMENT AREA: 8.3 STAFF DEVELOPMENT & RELATIONS - EVALUATION (ACADEMIC) (Cont'd)

STEP NO.	DESCRIPTION	INPUT[1]	OUTPUT[2]	PARTICIPANTS/ LOCATION
8.3.1.4	(d) Supernumerary Teachers	Operating Procedures Staff - 6 Staff - 21	Report of Principal - to Teacher - to School - to Field Office	Principal Supt. (Family)
		Staff - 3	Administrative Transfer	
8.3.1.5	(e) Supply Teachers	Operating Procedures Staff - 2	Evaluation by Principal	Principal
		Seminar Program	Approval as Supply Teacher Frequency of Employment	Supt. of Program Teacher Education Officer
8.3.2	Evaluation of Vice-Principals	Operating Procedures Staff - 21	Report of Principal - to Vice-Principal - to School Office - to Field Office	Principal Supt. (Family)
		Staff - 4	Promotion	Prin./Supt./Board
			Demotion	Prin./Supt./Board
		Staff - 3	Transfer	Supt.
			Dismissal	Prin./Supt./Board
			Professional Development	Supt. (Family) Supt. (Program)
			Involvement in Leadership Review Program	Leadership Review Personnel
			Triennial Review	Supt. (Academic Affairs) Supt. (Family) Supt. of Schools

MANAGEMENT AREA: 8.3 STAFF DEVELOPMENT & RELATIONS - EVALUATION (ACADEMIC) (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
8.3.3	Evaluation of Principals	Procedures for Evaluating Principals	Team Evaluation	Supt. (Academic Affairs) Supt. (Family) (two)
8.3.4	Evaluation of Superintendents	Draft Document		Trustees Director Supt.
8.3.5	Evaluation of Lay Assistants	Job Description of Role for each individual position	Informal Evaluation	Principal Supervisors
8.3.6	Evaluation of Resource Personnel	Performance in conducting inservice, workshops, seminars	Informal Evaluation Coordinators, Consultants, RT. Resource Teachers (RT)	Principal Supt. (Program) Supt. (Family)
8.3.7	Evaluation of Volunteers in Schools (unpaid)	Role established by Principal	Informal Supervision	Teacher Principal

MANAGEMENT AREA: 9.1 SCHOOL CURRICULUM (PROGRAM) - PROGRAM DEVELOPMENT & EVALUATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
9.1.1	Assessment of related programs	Existing Programs Survey Existing Curriculum guidelines Surveys of - Parents - Teachers - Supts. - C.D.C. - Federation	Resume of elements of existing programs to be considered in proposed program (CDC Draft Paper)	Staff Committee Parents Teachers Supts. C.D.C. Federation (Chairman CDC) Chief Psychologist
	Development of Objectives	Ministry Guidelines Board Policy Curriculum Development Council Draft Paper (1)	Recommended Statement of Objectives	Staff Committee Supts. Supt. (Program) Chief Psychologist
	Approval of Objectives	Recommended State of Objectives (2)	Approved Statement of Objectives	Curriculum Development Cour (Admin. Council Bo (where necessary but not usual)
9.1.2	Design of Draft Core Program	Approved Objectives (3) Available Program Material Internal Resources External Resources	Draft Program (Core) Draft Curriculum Guidelines	Curriculum Committ Curriculum Asst. Coordinator External Personnel -Ministry -OISE -Boards Supt. of Sch. Prog

MANAGEMENT AREA: 9.1 SCHOOL CURRICULUM (PROGRAM) (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
9.1.3	Selection of Evaluation Methods (5 at same time or after 4)	Draft Curriculum Guidelines	Evaluation and Testing Criteria (in core program or manual) (Norm Referencing) (Attitude Referencing) (Criterion Referencing)	Staff Committee C.D.C. Supt. Curriculum Supt. School Progra
	Evaluation of proposed core program material	Draft Curriculum Guidelines Statement of Objectives Evaluation and Testing Criteria	Curriculum Guidelines recommended	Experts -Ministry -Other Boards -Peel -Supt. Curr. and Supt. -Staff Cttee. -C.D.C. -Admin. Council
	Approval of Program	Interim Curriculum Guidelines	Approved Guidelines	C.D.C. Admin. Council Program Committee Board
	Dissemination of Program	Budget Supplies In-Service Seminars, Workshops Approved Guidelines	Program (Core) Implementation	Curriculum Asst. Resource Teachers Teachers Supt. of School (Program)
	Implementation	Curriculum Guidelines In-service seminars	In-service Strategies	Supt. of Schools (Family) Principal Teachers

MANAGEMENT AREA: 9.1 SCHOOL CURRICULUM (PROGRAM) (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Ongoing Evaluation of Program	Questionnaires - Parents - Teachers Standardized test results	Evaluation Reports Recommendations	Teachers Principals Resource Teachers Research Officer
	Periodic revision of Program	Curriculum Guidelines Evaluation Reports	Plans for continuation or revision (1) or in-service	Staff Committee C.D.C. Admin. Council -perhaps receiving report to program committee

MANAGEMENT AREA: 10.1 SPECIAL STUDENT SERVICES: (a) SPECIAL EDUCATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
10.1.1	Identification of student need by concerned parent/teacher/ other	Parent/teacher Attendance or psychological Outside source - medical/neighbour/relative	Referral by principal	Field
10.1.2	Assessment of Student	Psychological Services Attendance Services Special Education External Agency	Statement of the students' condition and needs Initiate pupil accounting process, i.e. reports sent to - principal - field--file to psychologist - CBO file	Field
10.1.3	Decision on course of Action	Parent Principal/Teacher Psych/Attend/Special Education	Need for placement in a particular special education program	Field/CBO
10.1.4	Placement	Discussion with parent/ parent concern	Placement in appropriate program at earliest possible time Waiting list established in priority order	Field/CBO
10.1.5	Program Planning (Physical)	Program Demand, e.g. number of students by program need; waiting lists Staff/facilities/material budget demands	(a) Development of program, in: - school; e.g., special education teacher, aids, suggestions to teachers - family of schools; e.g. perceptual handicapped - multiunit	Field

Cont'd.

MANAGEMENT AREA: 10.1 SPECIAL STUDENT SERVICES: (a) SPECIAL EDUCATION (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
10.1.5	Program Planning (Physical)		(b) Development of Program in: - region; e.g., hard of hearing - out of region; e.g., crippled - other agencies, e.g., Thistletown, Thinks	CBO/Coordinator of Special Ed.
10.1.6	On-going Evaluation of Students in Special Education (repeat steps 2 to 6 as necessary)	Student Progress Students Program	File of Student Evaluation	Field/CBO
10.1.7	Monitoring of student Progress once out of Special Education program	Student Progress Liaison with Boards, Agencies, Prof. Groups	Sustaining Change of Placement	CBO
10.1.8	Staff: - Recruitment (local/field) - Placement (local/field)	Staff Needs	Staff Hiring Placement of Staff	Local/CBO
10.1.9	Professional Development	Special Ed. staff, principal Superintendents, C.B.O. needs Need as seen by school, region, multiunits	Presentation of Program - courses, workshops, visits, etc.	Field/CBO
10.1.10	Budget	Cost for sustaining current operation New Programs	Budget Estimates Budget Implementation	Field/CBO

ont'd.

MANAGEMENT AREA: 10.1 SPECIAL STUDENT SERVICES: (a) SPECIAL EDUCATION (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
10.1.11	Curriculum Development	Input from steps 5 and 6 Student Needs Teacher Needs	Program definition - objectives - course outline - evaluation	Field/CBO
10.1.12	Material Development	Consultant Needs Teacher Needs Catalogue material Needs	Material Resource Books Material Displays	Field/CBO
10.1.13	Community Resources - Liaison with external groups, e.g., other boards, agencies, professional groups, etc.	Student Assessments and Needs	Use of Community Resources e.g. - assessment - kids in external program - program support	Field/CBO

MANAGEMENT AREA: 10.2 SPECIAL SERVICES: (b) ATTENDANCE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
10.2.1	Casework Counselling	Existing Casefiles (for recurring referrals) Specialist Assessments - psychiatric - medical Principal/Teacher formal & informal inputs Family Environment Community Agencies, other Boards	New or updated casefiles Assessment of student & family situation Recommended course of action Student progress monitoring records	Field/CBO CBO Field Field
	Provincial Court Actions	Daily Reports Response to Pre-court Hearing Certificate of Attendance	Court warning letter Summons papers Court disposition	CBO/Parents/ School Field
10.2. 2	Liaison with Home, School and Community Agencies	Special needs, problems of referred students	Referrals by agencies, hospitals, clinics, other boards of education	CBO/Field Office & Community Agencies
10.2. 3	Early School Leaving Program	E.S.L. Application & Proposed program School Personnel Assessments	Approval/disapproval of application	Secretary E.S.L. CBO
10.2. 4	Reporting and Budgeting	Case Files Statistical & Record Book Report	A.C.s' monthly caseload review Statistical & record book report Annual report to Board	Field Field CBO
10.2. 5	Special Research Studies	New legislation, policies, programs, etc.	Estimated Consequences Recommended changes in Attendance Counselling Services & procedures	CBO

MANAGEMENT AREA: 10.3 SPECIAL SERVICES: (c) PSYCHOLOGY DEPARTMENT

10.3.1 Psycho-Educational Diagnostic & Programming Services

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Identification of students within each school who require special consideration by the local school staff	Internal school records for previous years Current teacher assessments and/or standardized tests Expression of parental concern Reports from community personnel or agencies - especially medical, counselling Professional Development workshops relating to child development, learning problems, etc. from psych. staff and/or other sources Student	Appropriate class placement by principal Appropriate programming & management by teacher Counselling by staff	Principal, assisted by teachers and counsellors at each school
2	Identification of students within each school who require services of resources beyond the local school	As above Criteria for each of the services for referral	Referral to appropriate consultative service: -Attendance, Special Education, Psychology and/or Referral to appropriate community service: -Public health, Youth Bureau, etc. If decision is for referral to Psychology Dept., parental consent is obtained	Principal, assisted by teachers and counsellors at each school
3	Referral of appropriate students to Psychology Department	Directions from Psychology Dept. re information to be supplied by principal (standard form)	Written referral forwarded to the office of the Chief Psychologist at CBO, either directly or through the Field Office	Principal at each school

cont'd.

MANAGEMENT AREA: 10.3.1 SPECIAL SERVICES: (c) PSYCHOLOGY DEPARTMENT (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
4	Entry of the student's name into the CBO index of special students or notion of prior contact with any Special Service and information available	CBO index of files in FO for special students	CBO index of special students	Clerical asst. at Central Board Office of the Chief Psychologist
5	Psycho-educational assessment of needs	Written data as supplied by school with referral Reports of: - prior assessments Interview with student Student's performance on any test administered Interview with parents, or other individuals with relevant data Chief Psychologist or other Psych. staff, or professional literature	Consultation with teacher and/or principal regarding conclusions of psycho-educational assessment	Psychology Dept. Staff in Field Office
6	Decision regarding appropriate psycho-educational recommendations to be made for remediation and amelioration	Assessment information (see above) Chief Psychologist; other Psych. staff; professional literature; other Board consultants Directory of Community Services Consultation with principal, teacher, etc. to explore probable alternatives	Written report to principal summarizing conclusions of assessment & recommendations made. Copy of report to OSR and student's file identified by CBO index. Consultation with parents and verbal report given of assessment and recommendations	Psychology Dept. Staff in Field Office

Cont'd

MANAGEMENT AREA: 10.3 SPECIAL SERVICES: (C) PSYCHOLOGY DEPARTMENT (Cont'd)

STEP NO.	DESCRIPTION	INPUT[1]	OUTPUT[2]	PARTICIPANTS/ LOCATION
7	Implementation of recommendations which have been made		As identified in the above recommendations, e.g. (a) placement in special education program (b) remediation in regular class (c) counselling (d) referral to community agency--providing and receiving reports to/from community agencies (e) home management	-Field Office specia ed'n placement ctte -class teacher, Sp. Ed. resource teache -School Staff, Att. -Psych. staff -Parents -attendance counsell
8	Checkback or evaluation of recommendations	Principal, teacher and/or parent	Revision of recommendations where necessary	Psych. staff at Field Office

OVERVIEW

MANAGEMENT AREA: 10.3 SPECIAL SERVICES (c) PSYCHOLOGY DEPT.
10.3.2 Psychology, "One-With-One" Volunteer Program

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Search for initial identification and screening of potential volunteers. Explanation of program and general procedures	Appropriate program outline and procedures	Referral of appropriate individuals to Board's Project Director (Office of Chief Psychologist)	Community Coordinator 3 Public Groups
2	Final selection of volunteers and listing	Referral of appropriate individuals to Board's Program Director (Office of Chief Psychologist)	List of Volunteers - available or assigned	CBO Program Director
3	Identification of students requiring volunteer service	Assessment Data (i.e., 1-7 C) Program Outline Previous Annual Report	Student's recommended for "One-With-One" Volunteer Program	F.O. Psychology Staff
4	Recommendation to Principal of student for volunteer	Student's recommended for "One-With-One" Volunteer Program		F.O. Psychology Staff
5	Consideration of Recommendation	Teacher Viewpoint Program Outline	Approval or non-approval	Principal
6	Request for appropriate volunteer by F.O. Psychology Staff	Principal approval	Request for appropriate volunteer	F.O. Psychology Staff
7	Matching of student with appropriate volunteer and assignment of volunteer to F.O. Psychology Staff member	Catalogue of Volunteers Student Assessment Data from F.O. Psychology Staff	Assignment of student to appropriate volunteer Assignment volunteer to F.O. Psychology member	CBO Program Director

Cont'd.

MANAGEMENT AREA: 10.3 SPECIAL SERVICES: (c) PSYCHOLOGY DEPARTMENT
10.3.2 Psychology, "One-With-One" Volunteer Program (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
8	Explanation to parent of volunteer service and gaining consent for student's participation			F.O. Psychology Staff and School principal
9	"Program Planning" for the student	Teacher and Principal suggestions Materials, ideas from Psychology staff and Library at CBO		F.O. Psychology Staff and Volunteer
10	2.3 sessions (weekly) of volunteer with the student to carry out planning program		Monthly progress sheet (format doc.) Earlier report	Volunteer and Student
11	Consultation with/or Supervision of the Volunteer	Monthly progress sheet (format doc.) Earlier report	Additional information Changes in approach when necessary	Community Coordinators F.O. Psychology Staff
12	Monthly in-service program of skill development for volunteers	Volunteers Coordinators & Program Director Outside Resources Personnel		Program Director and Community Coordinators
13	Year end review of progress of each student with volunteer and decision regarding continuation or phasing out of program	Teacher, principal, volunteer	Memorandum to Program Director re: volunteer should continue in program due to various causes n.b.: memorandum always is written to an individual child	F.O. Psychology Staff
14	Year end evaluation of program and assessment of needs for new year	Psychology Staff Volunteers	Annual Report (Formal)	Program Director and Community Coordinators

MANAGEMENT AREA: 10.3 PSYCHOLOGY DEPARTMENT
10.3.3 Psychology Department Administration

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Determination of role and job descriptions for staff	From teachers, principals of schools From F.O. Psychology Staff	Job descriptions	CBO/Supt. of Special Services Chief Psychologist F.O. - Supt.
2	Determination of need for staff (i.e., number of staff)	Principals F.O. Psychology Staff Chief Psychologist	Staff needs included in F.O. Budget	F.O. Supt.
3	Approval for hiring of additional staff or determination of staff: student ratio	Staff needs included in F.O. Budget - supt. and CBO and Special Services - Chief Psychologist, consultation Specific data re work load in each F.O. (Back up data)	Board approval	Board
4	Hiring of Staff	Board approval Staff needs Interviews	Staff Hired	
5	Assignment of staff to F.O.			
6	Deployment of staff within F.O.	Chief Psychologist Consultation F.O. Psychology Staff	Staff deployment	F.O. Supt.
7	Consultation with staff and professional development of skills	F.O. Staff Consultations Committee on Professional Development Evaluations of Staff	Professional Development Program, set of topics for all staff Individual concession and supervision with chief Psychologist	Chief Psychologist

)Cont'd.

MANAGEMENT AREA: 10.3 PSYCHOLOGY DEPARTMENT
10.3.3 Psychology Department Administration (cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
8	Integration of Psychology Staff with other Board Consultatives Services in Special Services and other			F.O. Supt.
9	Supervision and evaluation of Psychology Staff	Principals Chief Psychologist	Evaluations (Formal)	F.O. Supt.

OVERVIEW

MANAGEMENT AREA: 10.3 PSYCHOLOGY DEPARTMENT
10.3.4 Psychology - General Resource and Consultative Service

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Dissemination of information regarding range of service available			All Psychology Staff
2	Identification of need for service			
3	Provision of Service			

MANAGEMENT AREA: 11.1 CONTINUING EDUCATION - ADULT EDUCATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
11.1.1	Selection of Administrative staff	G-memo to all Staff Applications from Staff Results of initial screening by field superintendents	Selected Staff	Principal of Continuing School
11.1.2	Brochure: Preparation, space allocations, and scheduling	Last year's brochure Miscellaneous information, e.g. letters Comparison of other jurisdictions for good ideas	Book of course offerings Space allocation	Coordinator of Continuing School
11.1.3	Tentative Staff Selection	G-memo to all teaching staff Applications received Screenings by night directors	Tentative Selection of Staff	Night (Field) Directors
11.1.4	Registration of students and allocation of students to classes	Student applications	What courses are economically viable and academically necessary Final staffing Refunds and information to applicants of unavailable courses	Continuing Ed. Staff Supervised by the Night Directors
11.1.5	Monitoring: of student attendance and academic progress, budget control, course evaluations	Attendance figures Student records	Remedial actions Current student records	Night Directors Head Office
11.1.6	Overall evaluation of adult program and Report to Board	Results of Program i.e. - attendance - written evaluation by students - number of students successfully completed courses	What kind of programs are successful on geographic and program basis	
11.1.7	Budget Estimates for next year	This year's results	Budget Estimate	

OVERVIEW

MANAGEMENT AREA: 11.2.1 CONTINUING EDUCATION - SUMMER SCHOOL (SENIOR)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Choose locations of summer schools, esp. credit and 7 & 8 remedial	Schools - accessibility - size - resources - air conditioning - competing usage - previous summer school usage	Selected schools - 3 in North and 3 in South	Principal of Continuing School
2	Selection of Administrative Staff	G-memos to staff for Directors and subject chairman Applications from staff	Selected staff for north and south 1 Director 2 Assistant Directors English, Math & Science subject chairman	Principal of Continuing School
3	Planning, advertising, Promoting summer school	Evaluations of previous year's operations Suggestions from interested groups (Supts., Trustees, etc.) Estimated student demand for summer school	Circular advertising program, to all students Tentative estimates of resources required, e.g., teachers	Principal of Continuing School plus Administrators
4	Tentative Staff Selection	G-memo to all teaching staff Applications received Results of screening by Supts. Interview records	Ranking of teachers by subject Interim letters of appointment to likely teachers	
5	Student Registration and class scheduling	Student Applications Prescriptive diagnostics (7 & 8 remedial)	Economically viable and academically necessary courses Final staffing Refunds, etc. Transportation requirements	Mainly Directors

Cont'd.

MANAGEMENT AREA: 11.2.1 CONTINUING EDUCATION - SUMMER SCHOOL (SENIOR)

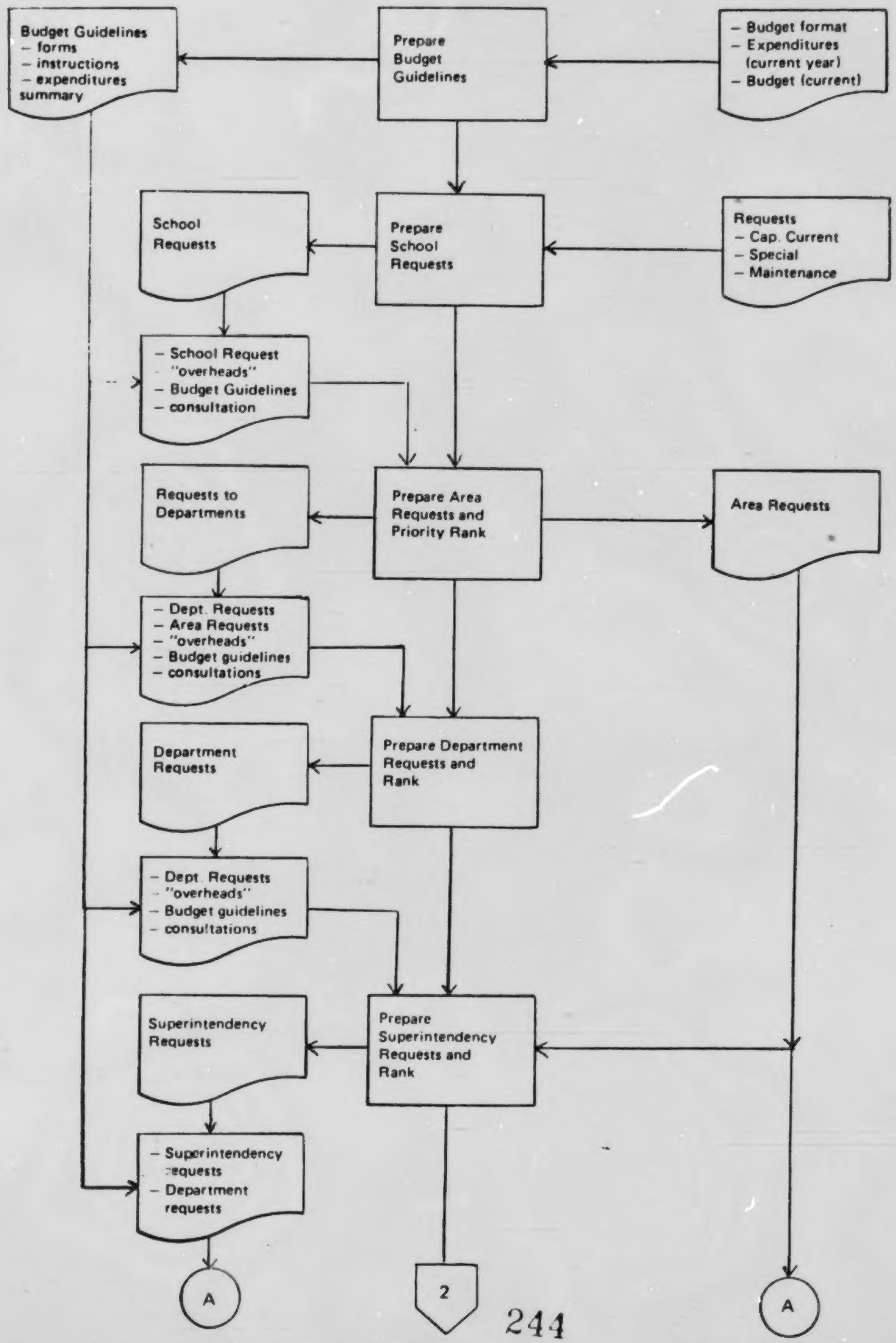
STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
6	Monitoring: Student Attendance and Academic Progress, Budget Control, Course Evaluations	Class attendance registers Student records	Remedial actions Student reports	Directors, Subject Chairman, Teachers
7	Summary and Evaluation of Summer School Program	Attendance records and academic results	Report to the Board Input to next year's summer school planning	Principal of Continuing School
8	Budget Estimates for next year	This year's results	Budget Estimate	Principal of continuing School

APPENDIX C:

FLOWCHARTS OF MAJOR MANAGEMENT AREAS

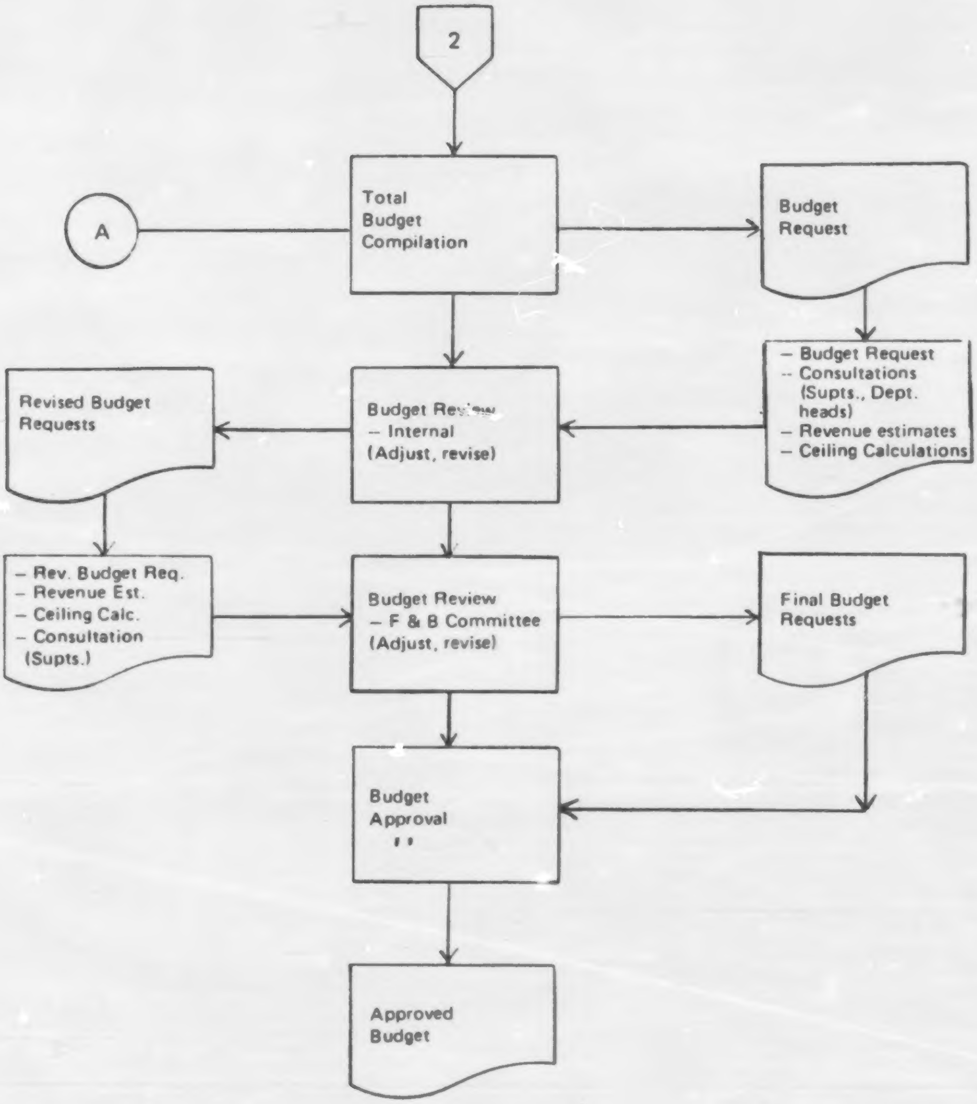
1.1 BUDGET PREPARATION

1 of 2


Budget Guidelines
– forms
– instructions
– expenditures summary
Prepare Budget Guidelines
– Budget format
– Expenditures (current year)
– Budget (current)
School Requests
Prepare School Requests
Requests
– Cap. Current
– Special
– Maintenance
– School Request "overheads"
– Budget Guidelines
– consultation
Requests to Departments
Prepare Area Requests and Priority Rank
Area Requests
– Dept. Requests
– Area Requests
– "overheads"
– Budget guidelines
– consultations
Department Requests
Prepare Department Requests and Rank
– Dept. Requests
– "overheads"
– Budget guidelines
– consultations
Superintendency Requests
Prepare Superintendency Requests and Rank
– Superintendency requests
– Department requests
A
2
A

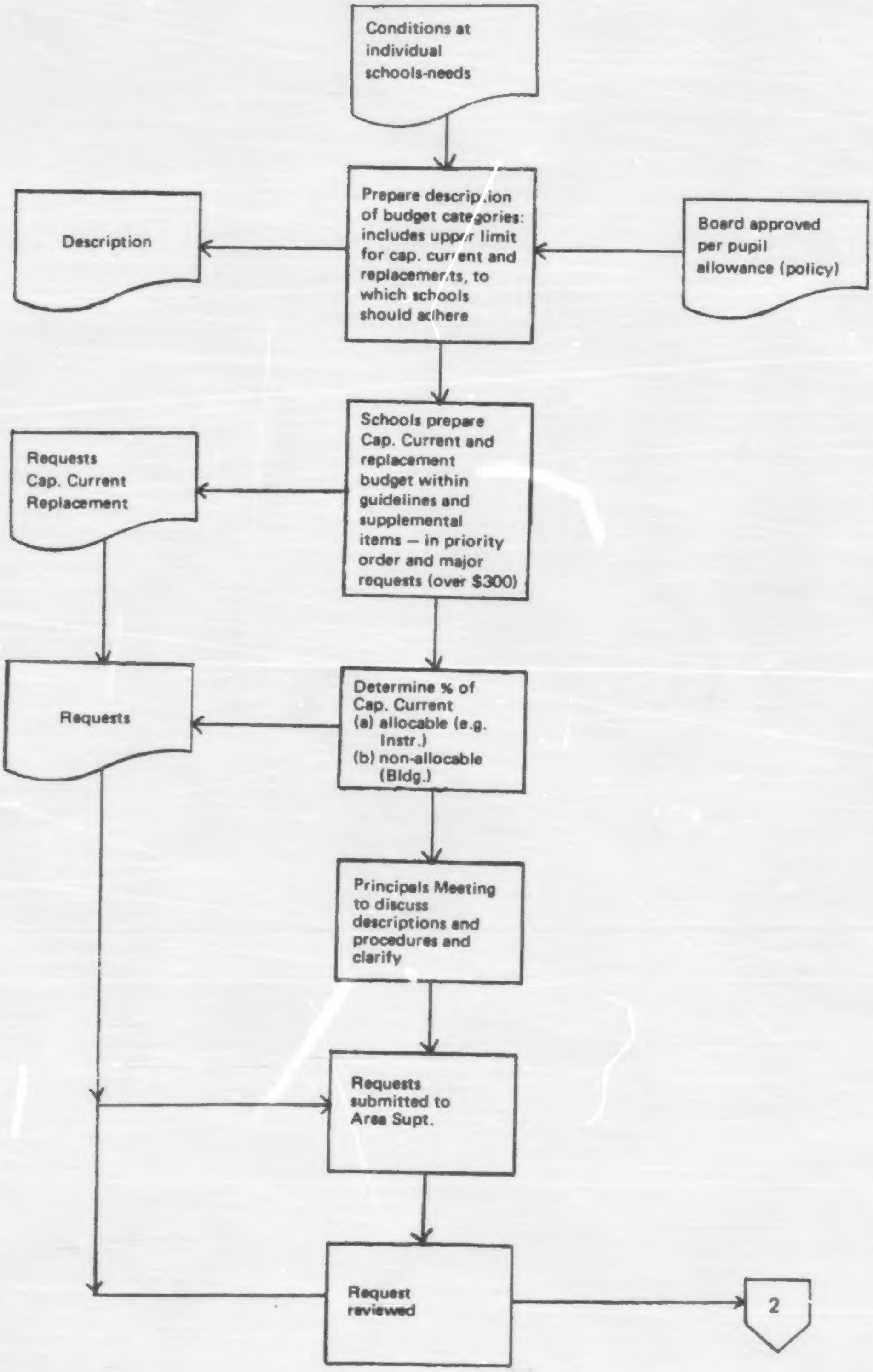
1.1 (cont'd)

2 of 2


2
A
Total Budget Compilation
Budget Request
- Budget Request
-- Consultations (Supts., Dept. heads)
- Revenue estimates
- Ceiling Calculations
Revised Budget Requests
Budget Review – Internal (Adjust, revise)
- Rev. Budget Req.
- Revenue Est.
- Ceiling Calc.
- Consultation (Supts.)
Budget Review – F & B Committee (Adjust, revise)
Final Budget Requests
Budget Approval
Approved Budget

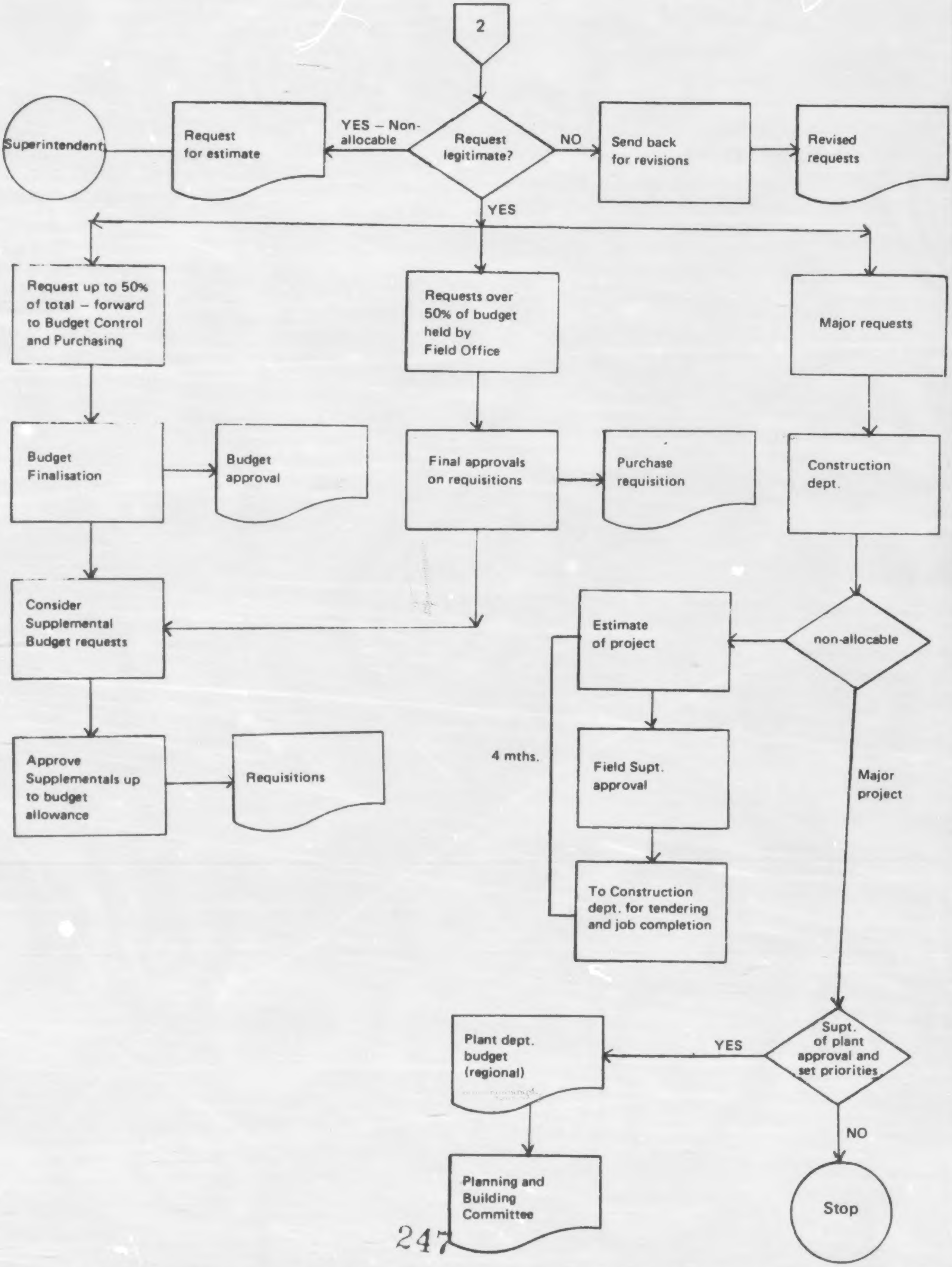
1.1.2.1 BUDGET PREPARATION: School Requests from Field Office

1 of 2

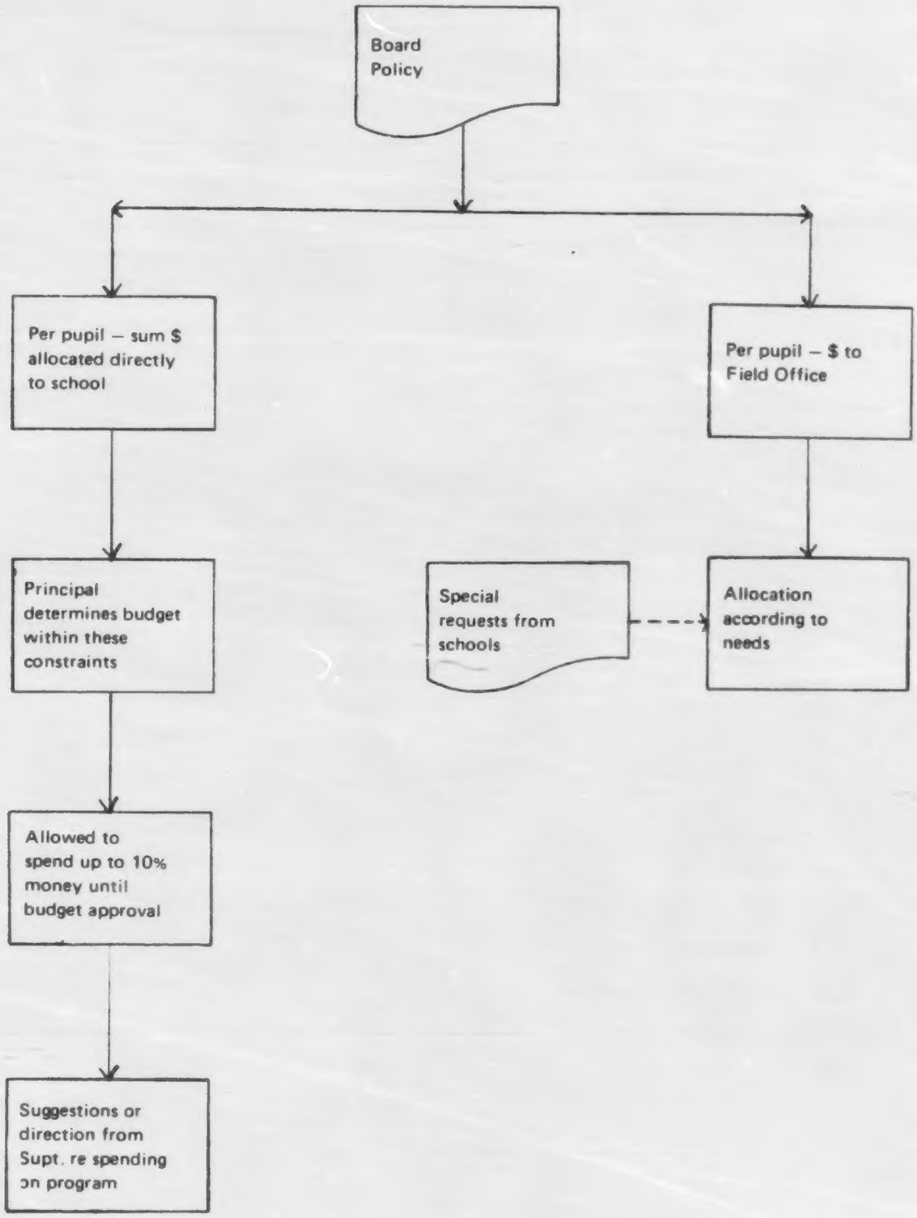

Conditions at individual schools-needs
Prepare description of budget categories: includes upper limit for cap. current and replacements, to which schools should adhere
Description
Board approved per pupil allowance (policy)
Schools prepare Cap. Current and replacement budget within guidelines and supplemental items — in priority order and major requests (over $300)
Requests Cap. Current Replacement
Determine % of Cap. Current (a) allocable (e.g. Instr.) (b) non-allocable (Bldg.)
Requests
Principals Meeting to discuss descriptions and procedures and clarify
Requests submitted to Area Supt.
Request reviewed
2

1.1.2.1 (cont'd)

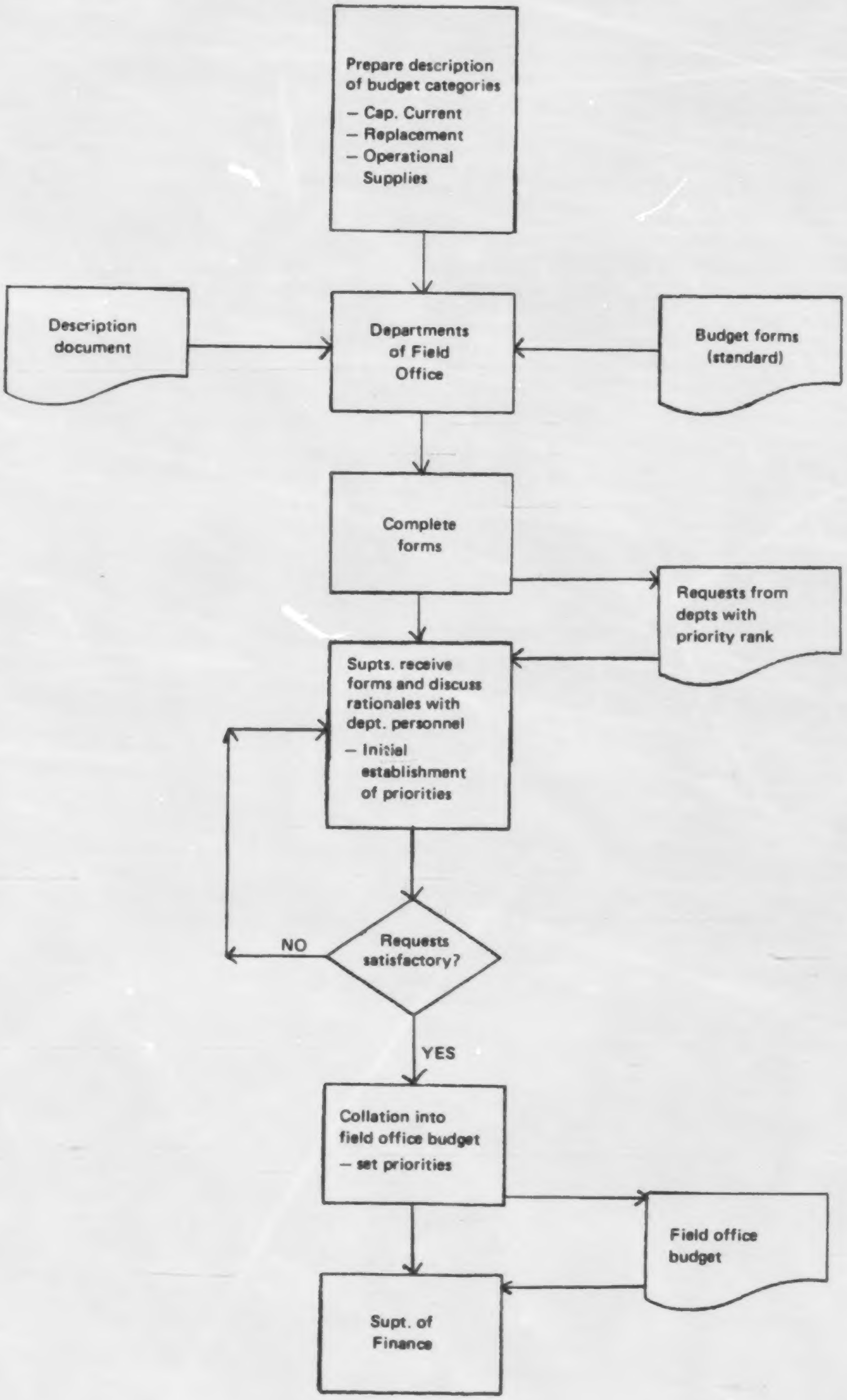
2 of 2


2
Superintendent
Request for estimate
YES – Non-allocable
Request legitimate?
NO
Send back for revisions
Revised requests
YES
Request up to 50% of total – forward to Budget Control and Purchasing
Requests over 50% of budget held by Field Office
Major requests
Budget Finalisation
Budget approval
Final approvals on requisitions
Purchase requisition
Construction dept.
Consider Supplemental Budget requests
Estimate of project
non-allocable
Approve Supplementals up to budget allowance
Requisitions
4 mths.
Field Supt. approval
Major project
To Construction dept. for tendering and job completion
Plant dept. budget (regional)
YES
Supt. of plant approval and set priorities
NO
Planning and Building Committee
Stop

1.1.2.2 BUDGET PREPARATION: School Requests – Operational Budget (Schools)

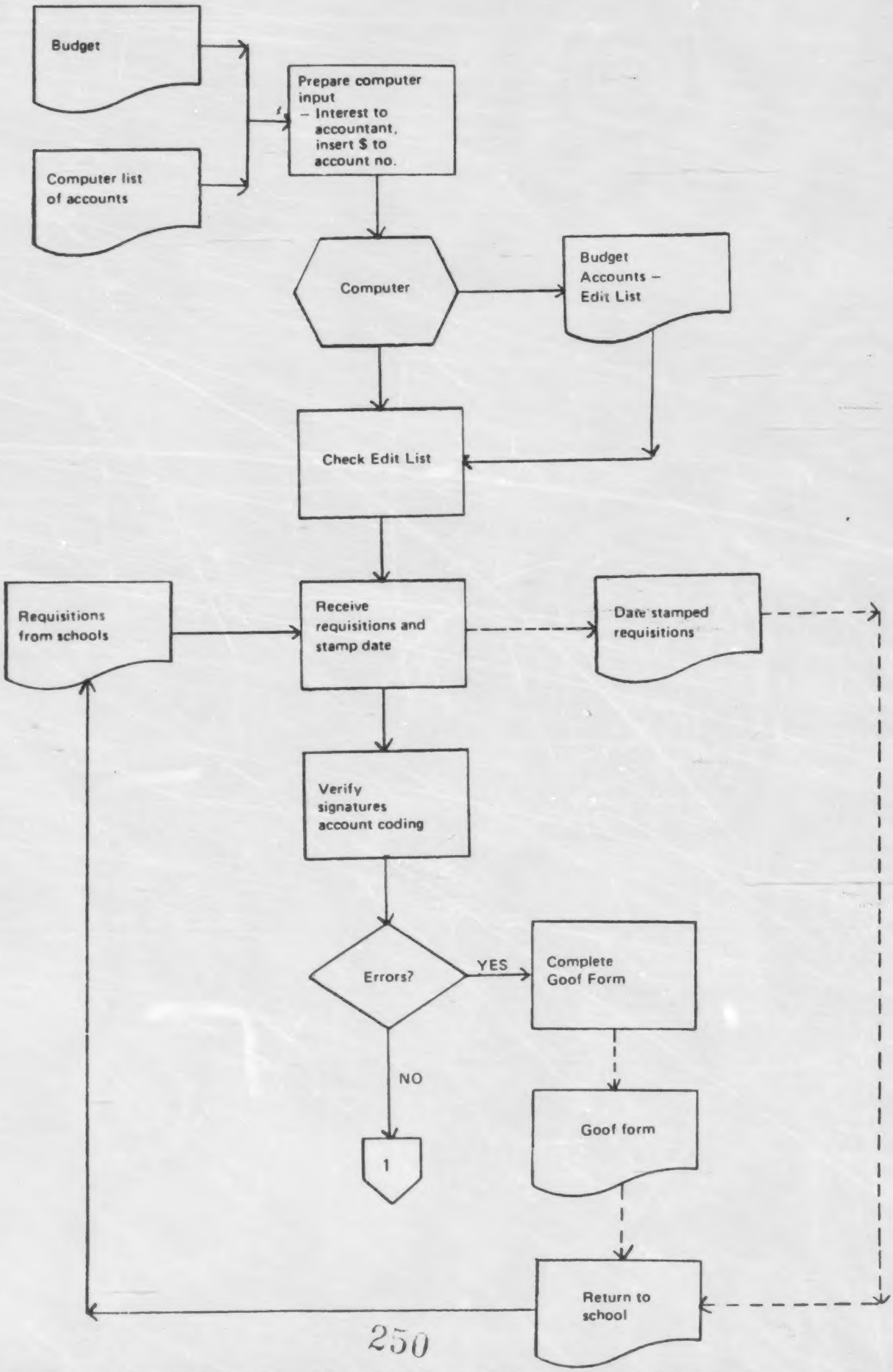

Board Policy
Per pupil – sum $ allocated directly to school
Per pupil – $ to Field Office
Principal determines budget within these constraints
Special requests from schools
Allocation according to needs
Allowed to spend up to 10% money until budget approval
Suggestions or direction from Supt. re spending on program

1.1.3 BUDGET PREPARATION: Prepare Area Requests


Prepare description of budget categories
– Cap. Current
– Replacement
– Operational Supplies
Description document
Departments of Field Office
Budget forms (standard)
Complete forms
Requests from depts with priority rank
Supts. receive forms and discuss rationales with dept. personnel
– Initial establishment of priorities
NO
Requests satisfactory?
YES
Collation into field office budget
– set priorities
Field office budget
Supt. of Finance

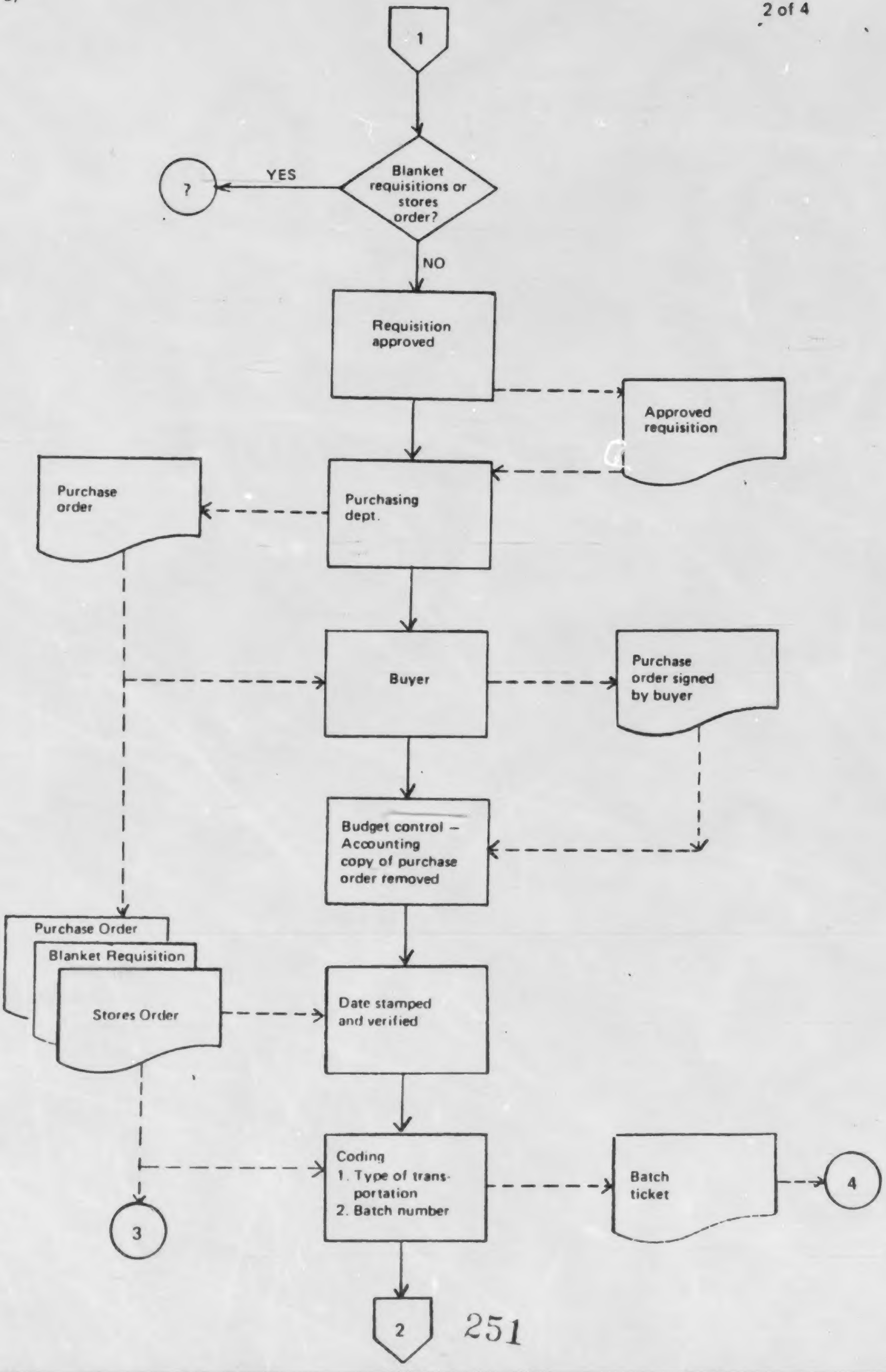
1.2 BUDGET CONTROL

1 of 4


Budget
Computer list of accounts
Prepare computer input – Interest to accountant, insert $ to account no.
Computer
Budget Accounts – Edit List
Check Edit List
Requisitions from schools
Receive requisitions and stamp date
Date stamped requisitions
Verify signatures account coding
Errors?
YES
Complete Goof Form
NO
1
Goof form
Return to school

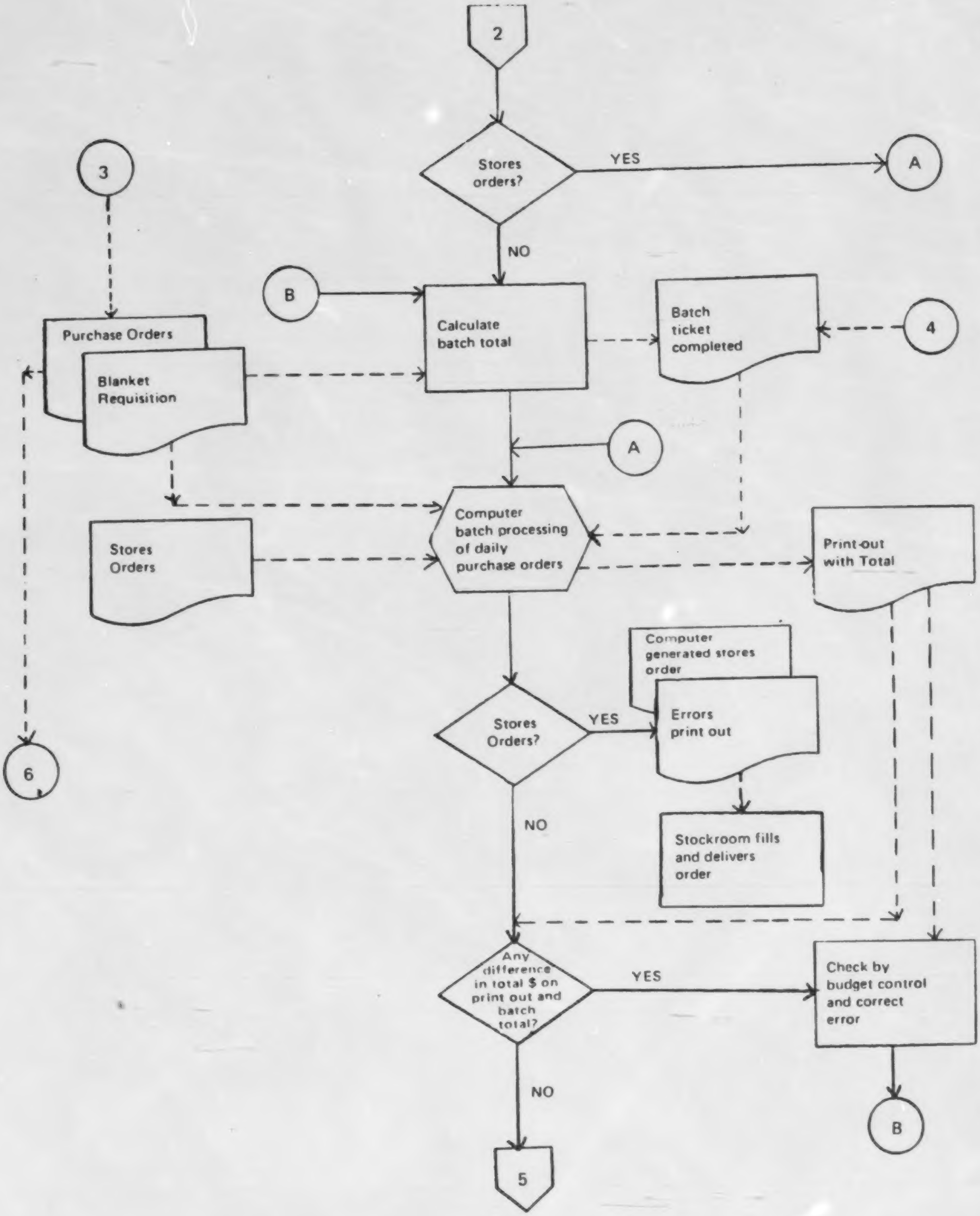
1.2 (cont'd)

2 of 4


1
Blanket requisitions or stores order?
YES
?
NO
Requisition approved
Approved requisition
Purchase order
Purchasing dept.
Buyer
Purchase order signed by buyer
Budget control – Accounting copy of purchase order removed
Purchase Order
Blanket Requisition
Stores Order
Date stamped and verified
Coding
1. Type of transportation
2. Batch number
Batch ticket
4
3
2

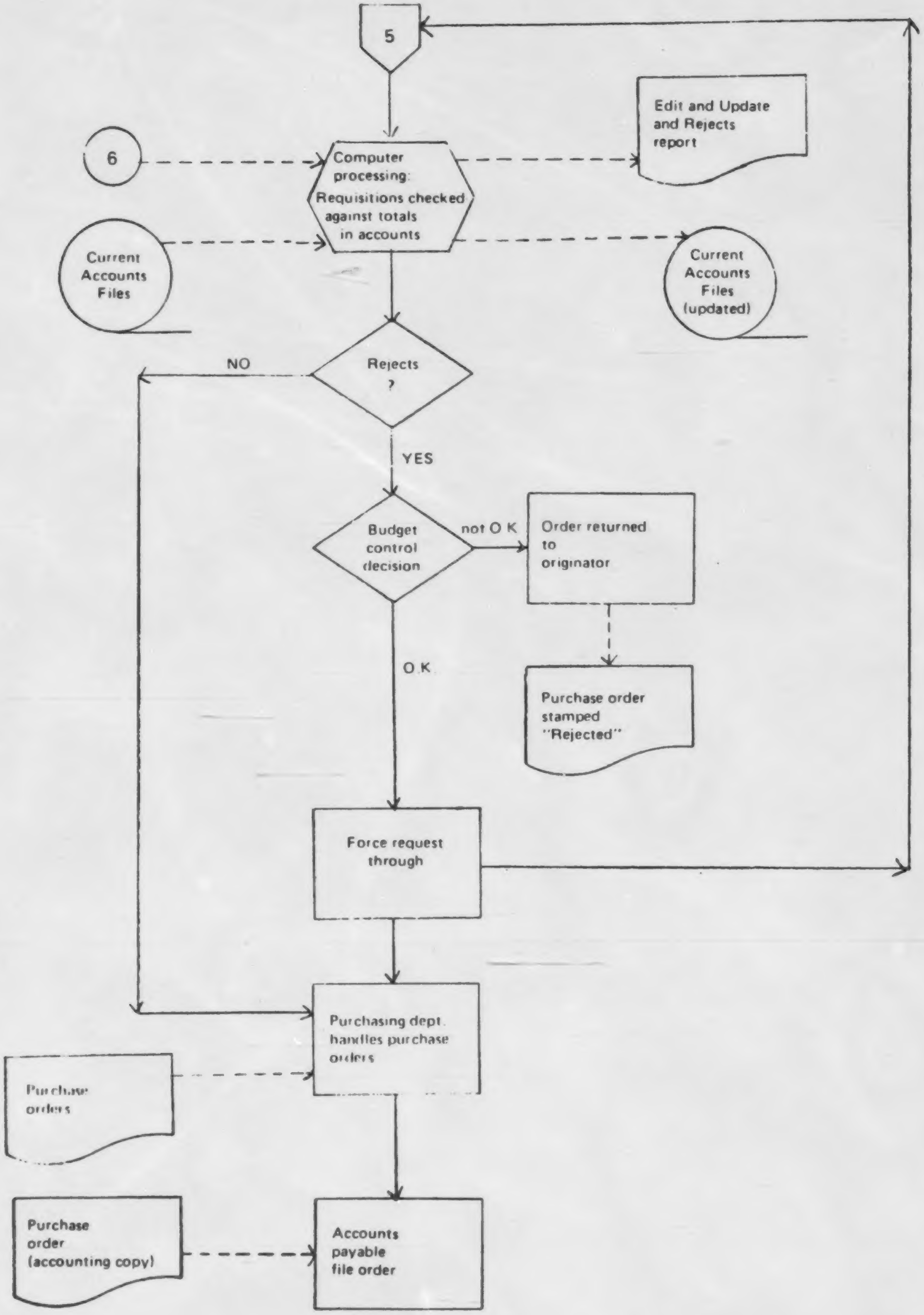
1.2 (cont'd)

3 of 4

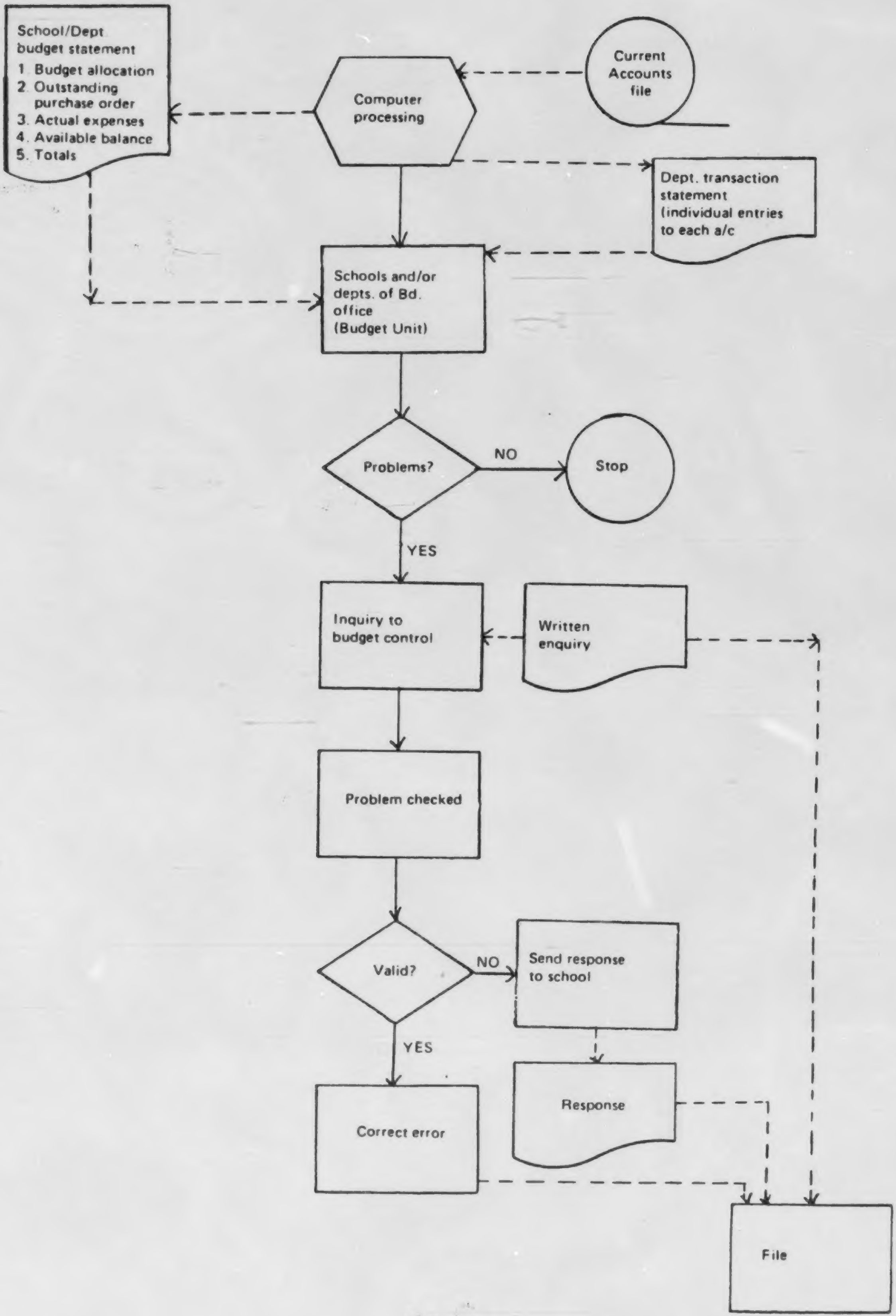

2
Stores orders?
YES
A
NO
3
B
Calculate batch total
Batch ticket completed
4
Purchase Orders
Blanket Requisition
A
Computer batch processing of daily purchase orders
Stores Orders
Print-out with Total
Computer generated stores order
Errors print out
Stores Orders?
YES
6
NO
Stockroom fills and delivers order
Any difference in total $ on print out and batch total?
YES
Check by budget control and correct error
NO
B
5

1.2 (cont'd)

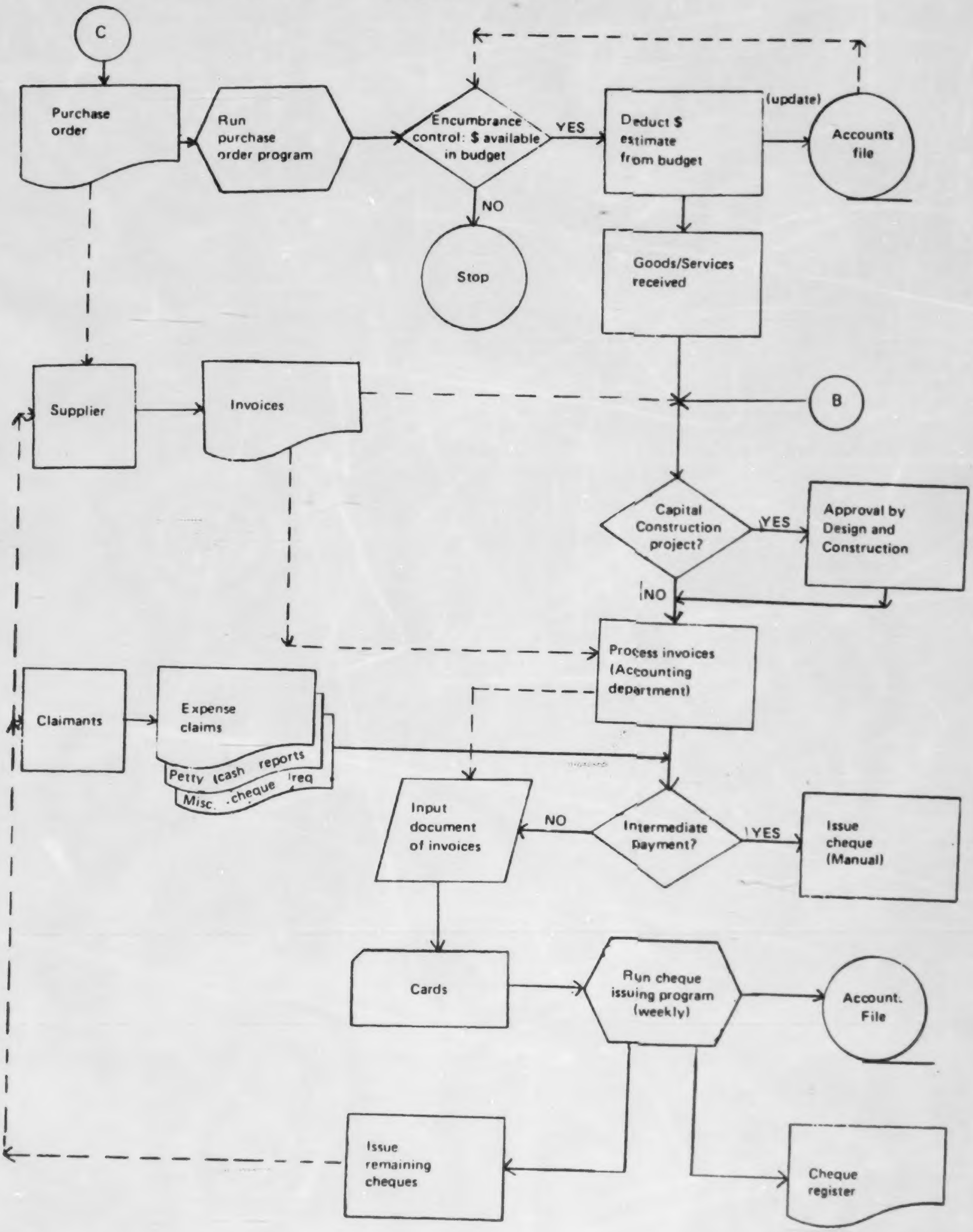
4 of 4


5
6
Computer processing: Requisitions checked against totals in accounts
Edit and Update and Rejects report
Current Accounts Files
Current Accounts Files (updated)
Rejects ?
NO
YES
Budget control decision
not O.K.
Order returned to originator
Purchase order stamped "Rejected"
O.K.
Force request through
Purchasing dept. handles purchase orders
Purchase orders
Purchase order (accounting copy)
Accounts payable file order

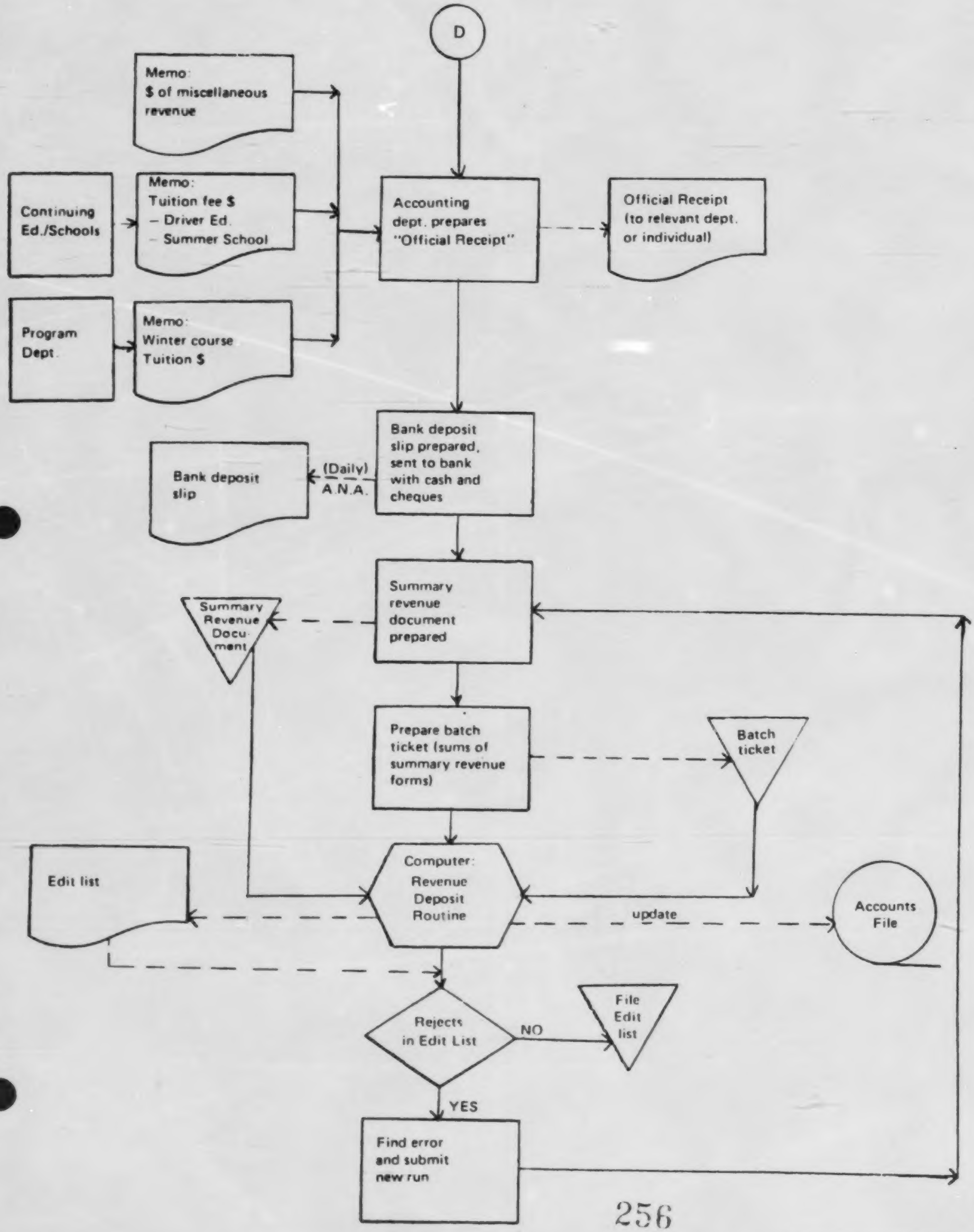
1.2.1 BUDGET CONTROL: Monthly Summary


School/Dept budget statement
1. Budget allocation
2. Outstanding purchase order
3. Actual expenses
4. Available balance
5. Totals
Computer processing
Current Accounts file
Dept. transaction statement (individual entries to each a/c
Schools and/or depts. of Bd. office (Budget Unit)
Problems?
NO
Stop
YES
Inquiry to budget control
Written enquiry
Problem checked
Valid?
NO
Send response to school
YES
Correct error
Response
File

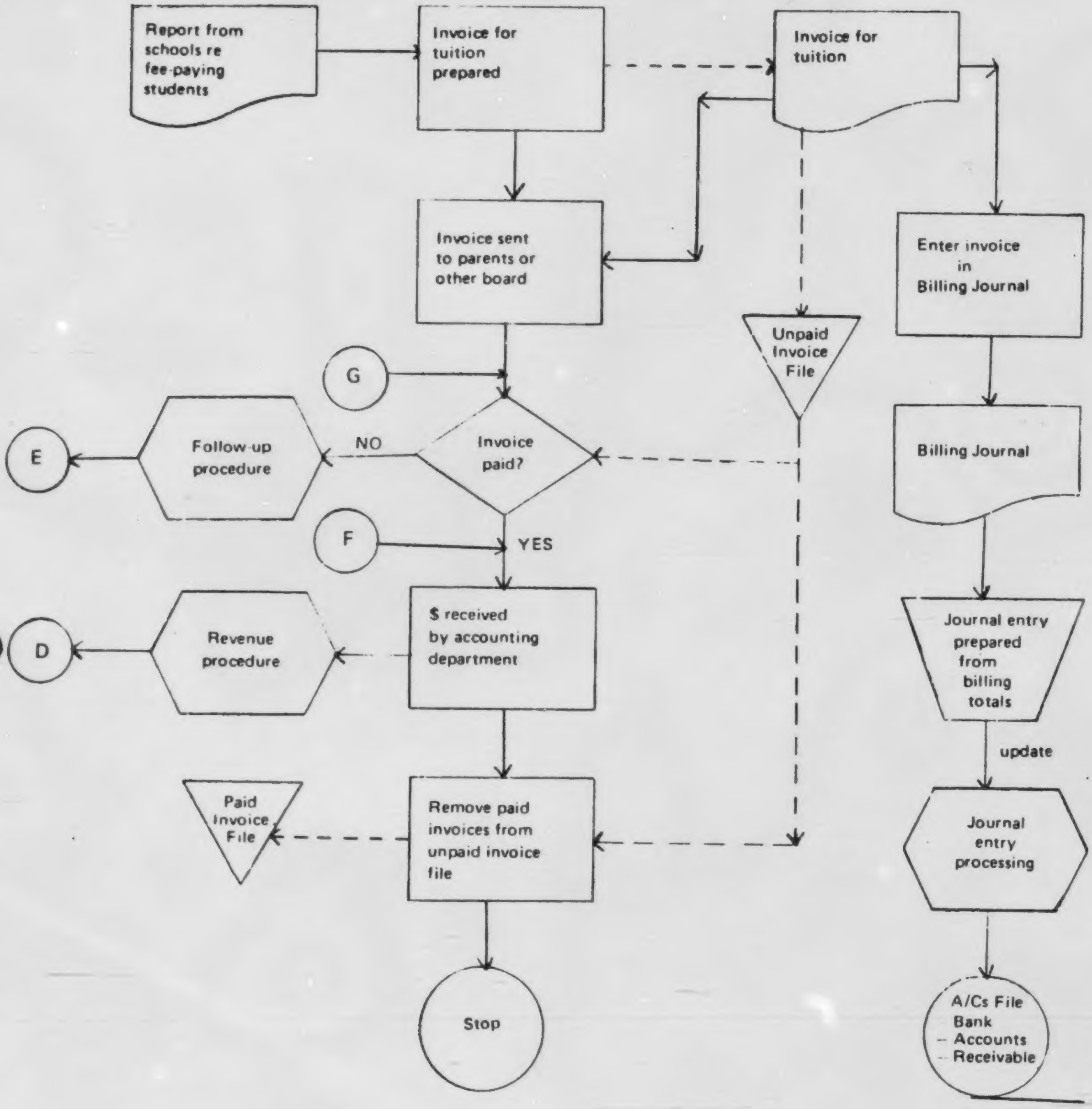
2.1 ACCOUNTING FUNCTION: Accounts Payable


C
Purchase order
Run purchase order program
Encumbrance control: $ available in budget
YES
NO
Stop
Deduct $ estimate from budget
(update)
Accounts file
Goods/Services received
Supplier
Invoices
B
Capital Construction project?
YES
Approval by Design and Construction
NO
Process invoices (Accounting department)
Claimants
Expense claims
Petty cash reports
Misc. cheque req
Input document of invoices
NO
Intermediate payment?
YES
Issue cheque (Manual)
Cards
Run cheque issuing program (weekly)
Account. File
Issue remaining cheques
Cheque register

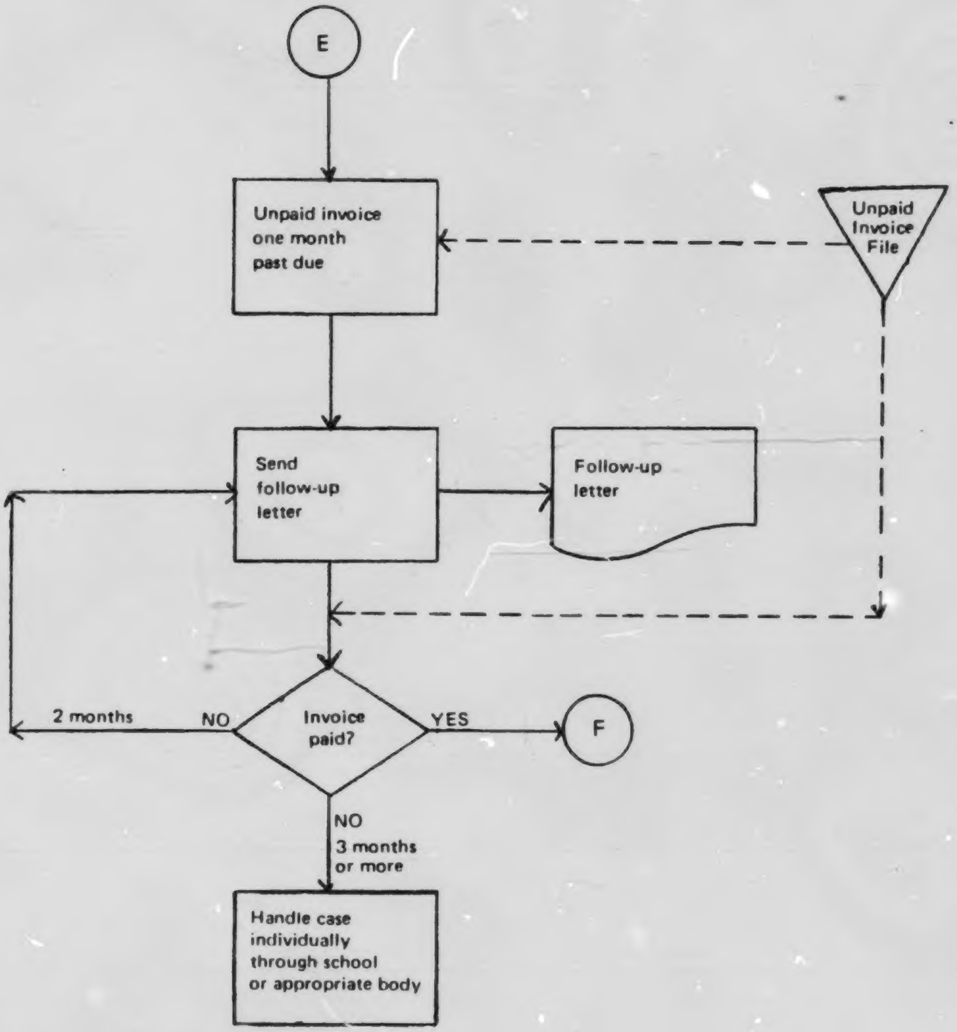
2.2.1 ACCOUNTING FUNCTION: Accounts Receivable and Revenue — Miscellaneous Revenue and Tuition Fee Revenue


D
Memo: $ of miscellaneous revenue
Continuing Ed./Schools
Memo: Tuition fee $ – Driver Ed. – Summer School
Program Dept.
Memo: Winter course Tuition $
Accounting dept. prepares "Official Receipt"
Official Receipt (to relevant dept. or individual)
Bank deposit slip prepared, sent to bank with cash and cheques
(Daily) A.N.A.
Bank deposit slip
Summary revenue document prepared
Summary Revenue Document
Prepare batch ticket (sums of summary revenue forms)
Batch ticket
Computer: Revenue Deposit Routine
Edit list
update
Accounts File
Rejects in Edit List
NO
File Edit list
YES
Find error and submit new run

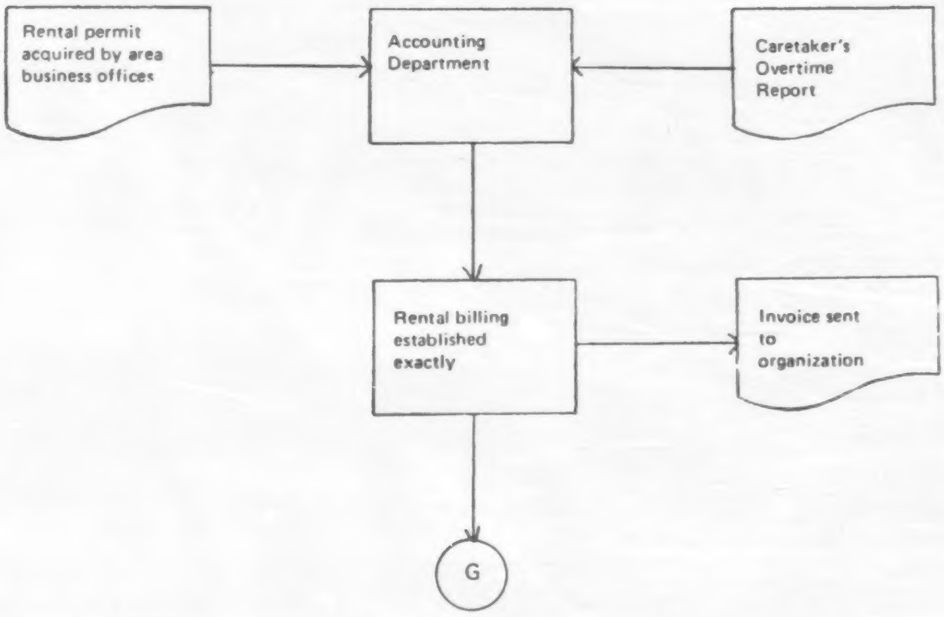
2.2.2. ACCOUNTING FUNCTION: Accounts Receivable – Tuition Fees (Day School)


Report from schools re fee-paying students
Invoice for tuition prepared
Invoice for tuition
Invoice sent to parents or other board
Enter invoice in Billing Journal
Unpaid Invoice File
G
Invoice paid?
NO
Follow-up procedure
E
Billing Journal
F
YES
$ received by accounting department
Revenue procedure
D
Journal entry prepared from billing totals
update
Paid Invoice File
Remove paid invoices from unpaid invoice file
Journal entry processing
Stop
A/Cs File
Bank
– Accounts
– Receivable

2.2.2.1 ACCOUNTING FUNCTION: Accounts Receivable – Tuition Fees (Follow-up procedure)

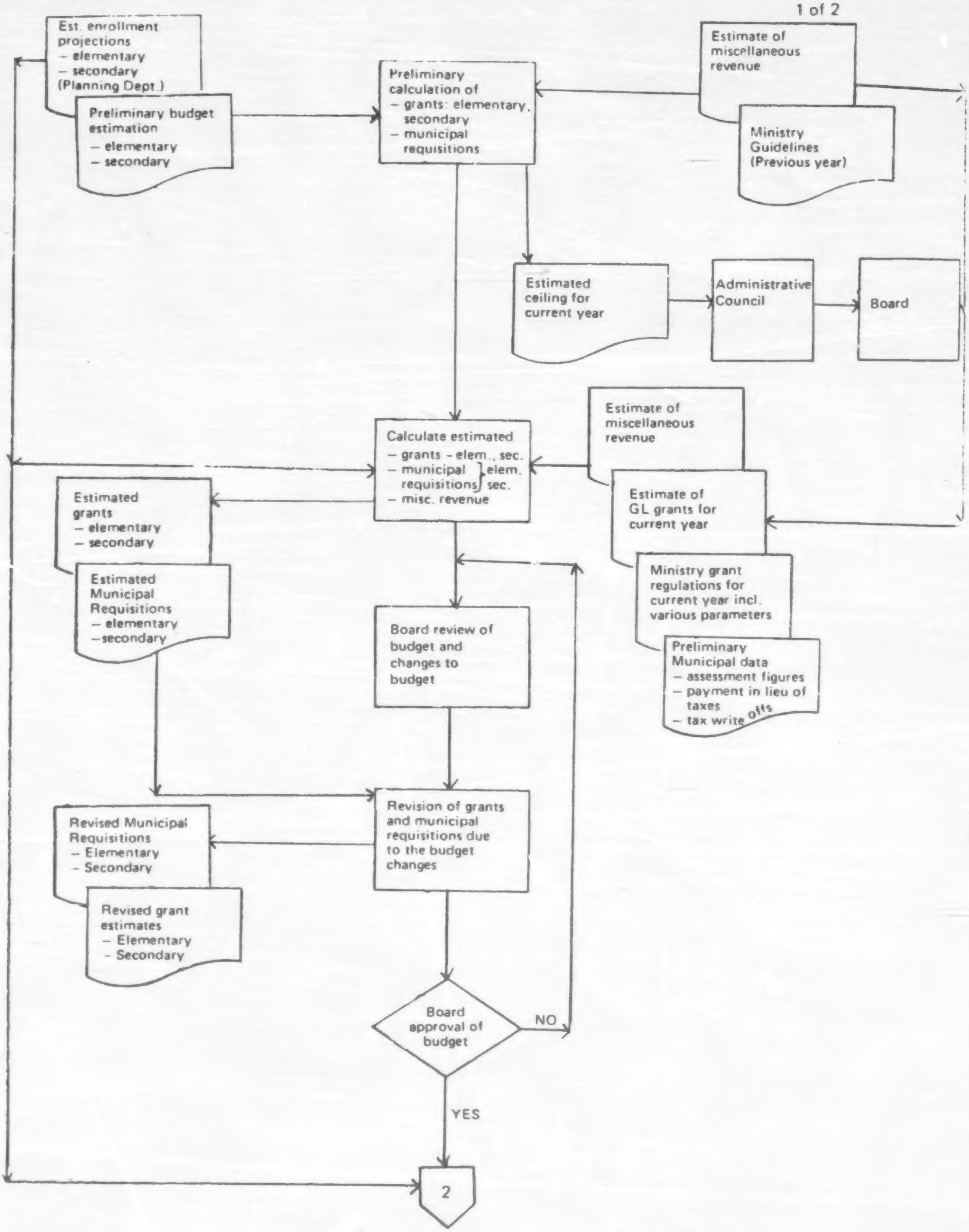

E
Unpaid invoice one month past due
Unpaid Invoice File
Send follow-up letter
Follow-up letter
2 months
NO
Invoice paid?
YES
F
NO
3 months or more
Handle case individually through school or appropriate body

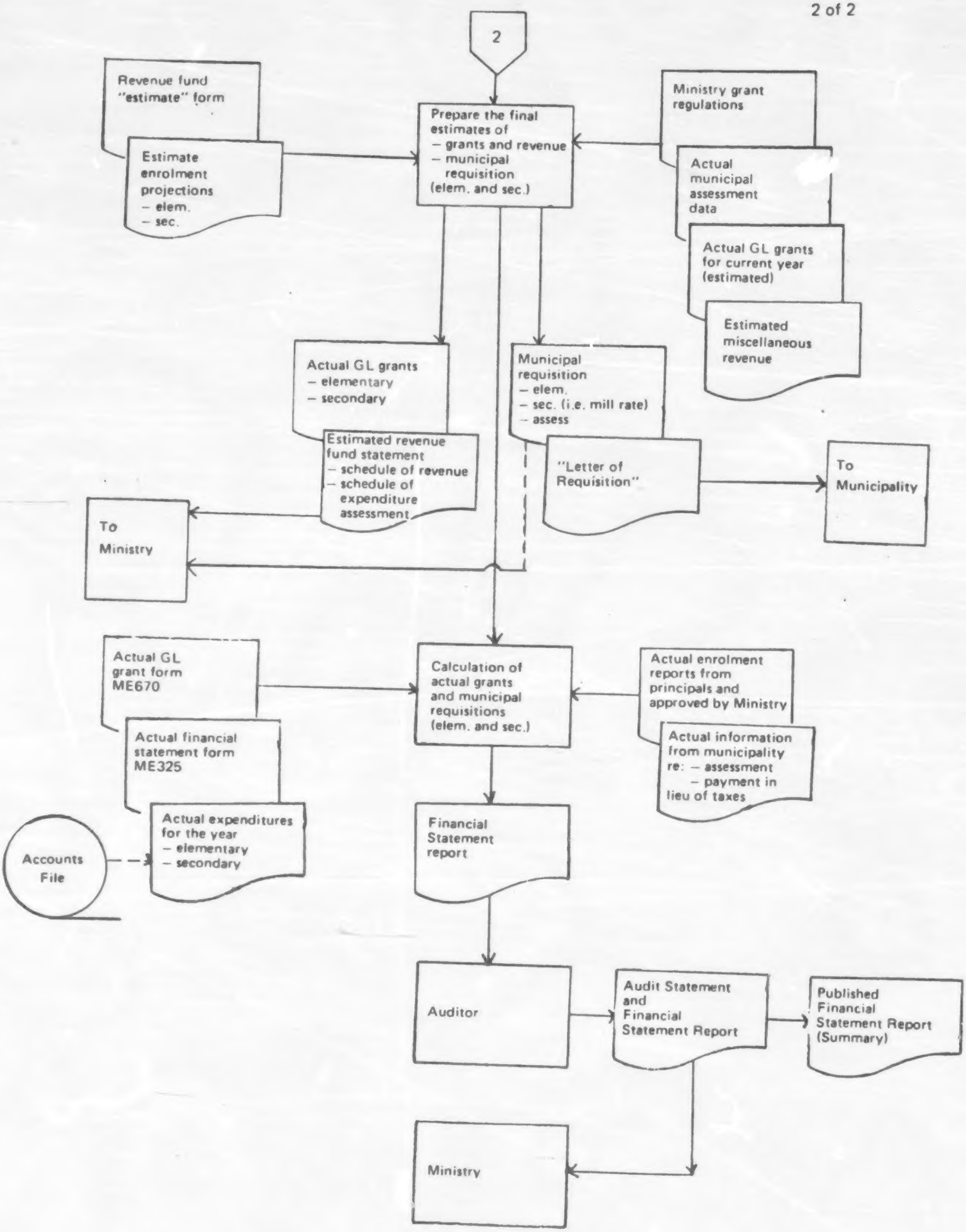
2.2.3 ACCOUNTING FUNCTION: Accounts Receivable – Rental billing and Revenue


Rental permit acquired by area business offices
Accounting Department
Caretaker's Overtime Report
Rental billing established exactly
Invoice sent to organization
G

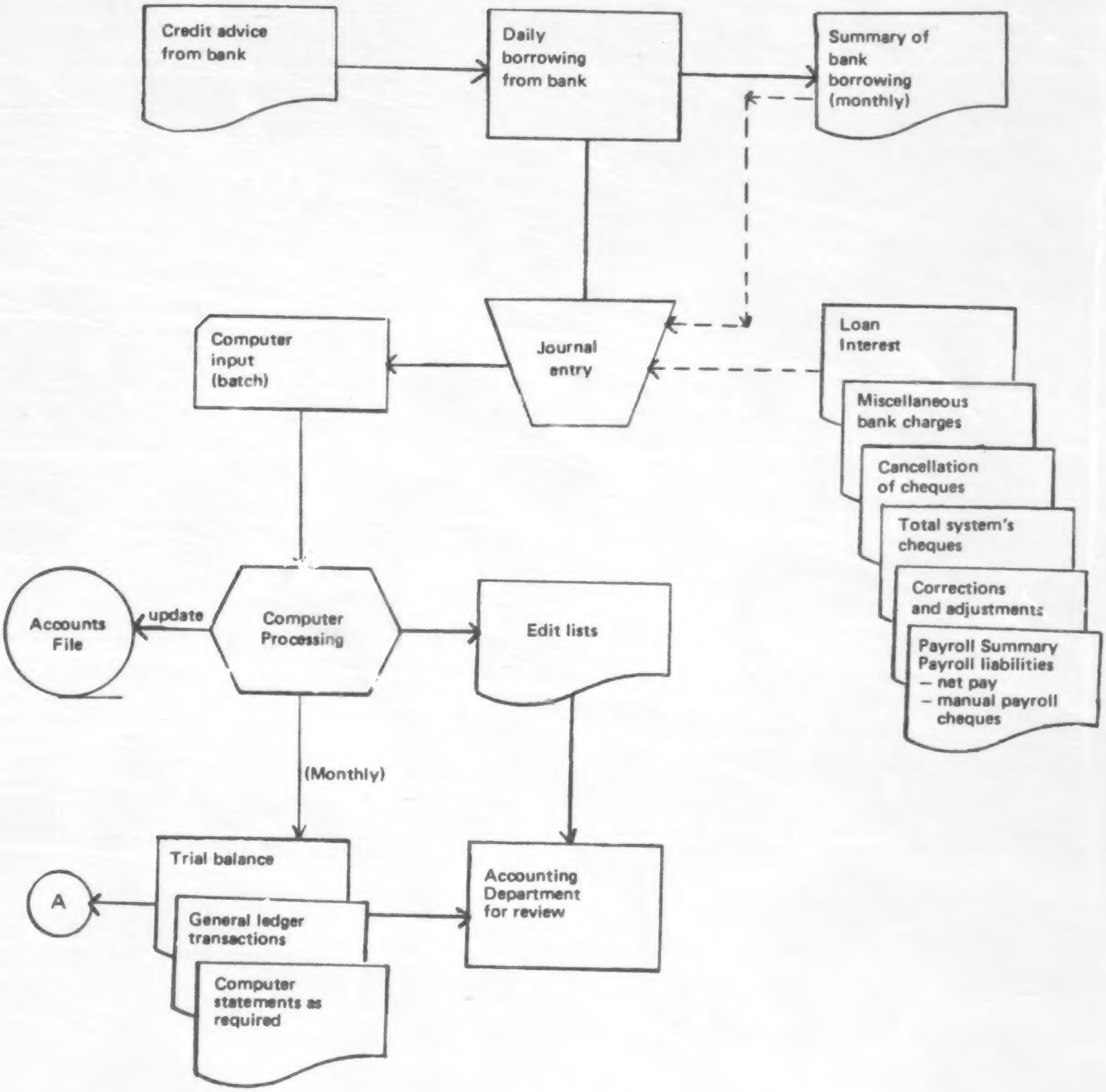
2.2.4 ACCOUNTING FUNCTION: Accounts Receivable - Financial Reporting to Ministry

1 of 2

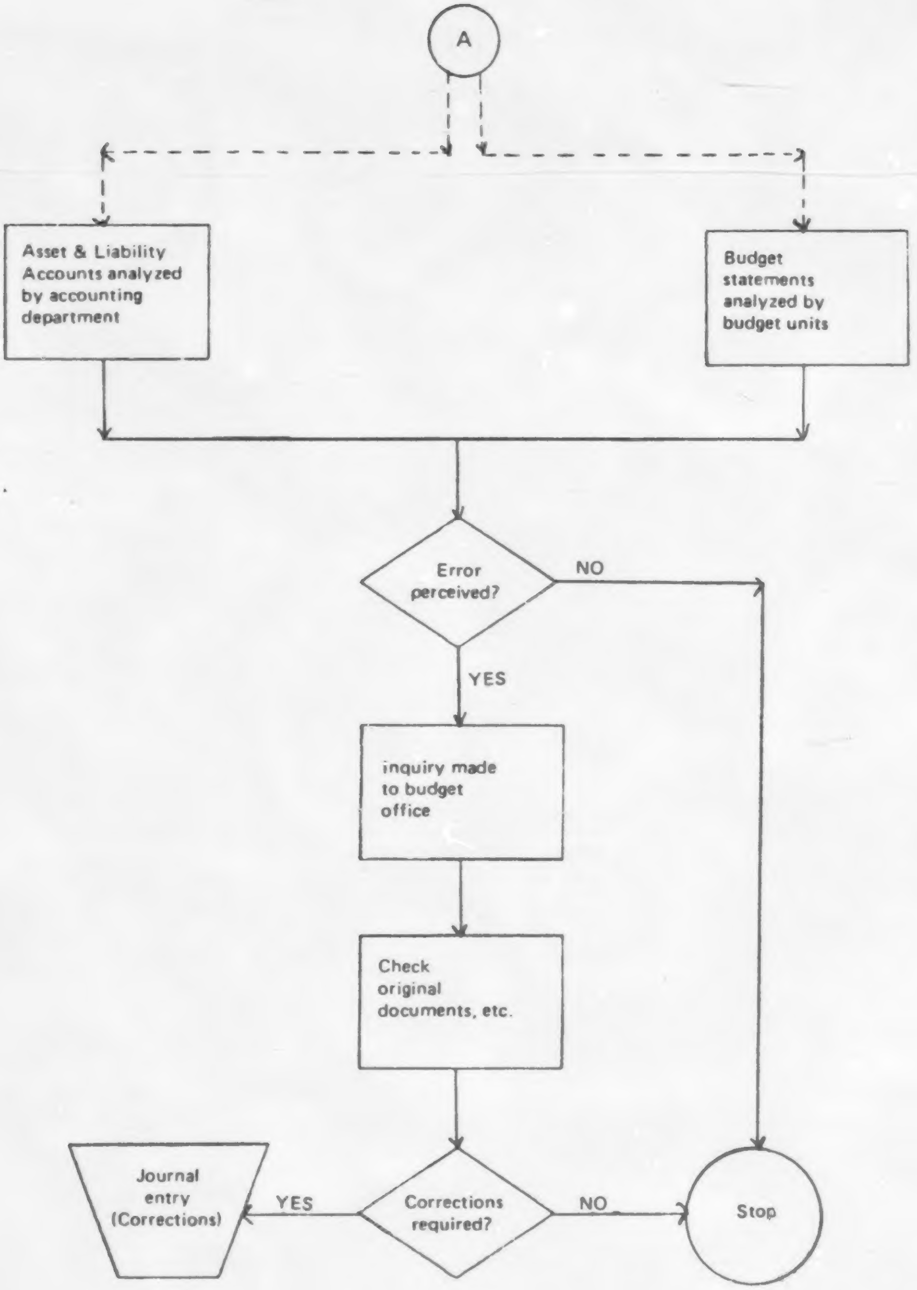

Est. enrollment projections
– elementary
– secondary
(Planning Dept.)
Preliminary budget estimation
– elementary
– secondary
Preliminary calculation of
– grants: elementary, secondary
– municipal requisitions
Estimate of miscellaneous revenue
Ministry Guidelines (Previous year)
Estimated ceiling for current year
Administrative Council
Board
Calculate estimated
– grants - elem., sec.
– municipal requisitions elem. sec.
– misc. revenue
Estimate of miscellaneous revenue
Estimate of GL grants for current year
Ministry grant regulations for current year incl. various parameters
Preliminary Municipal data
– assessment figures
– payment in lieu of taxes
– tax write offs
Estimated grants
– elementary
– secondary
Estimated Municipal Requisitions
– elementary
–secondary
Board review of budget and changes to budget
Revision of grants and municipal requisitions due to the budget changes
Revised Municipal Requisitions
– Elementary
– Secondary
Revised grant estimates
– Elementary
– Secondary
Board approval of budget
NO
YES
2


2
Revenue fund "estimate" form
Estimate enrolment projections
– elem.
– sec.
Prepare the final estimates of
– grants and revenue
– municipal requisition (elem. and sec.)
Ministry grant regulations
Actual municipal assessment data
Actual GL grants for current year (estimated)
Estimated miscellaneous revenue
Actual GL grants
– elementary
– secondary
Estimated revenue fund statement
– schedule of revenue
– schedule of expenditure assessment
Municipal requisition
– elem.
– sec. (i.e. mill rate)
– assess
"Letter of Requisition"
To Municipality
To Ministry
Actual GL grant form ME670
Actual financial statement form ME325
Actual expenditures for the year
– elementary
– secondary
Accounts File
Calculation of actual grants and municipal requisitions (elem. and sec.)
Actual enrolment reports from principals and approved by Ministry
Actual information from municipality re: – assessment
– payment in lieu of taxes
Financial Statement report
Auditor
Audit Statement and Financial Statement Report
Published Financial Statement Report (Summary)
Ministry

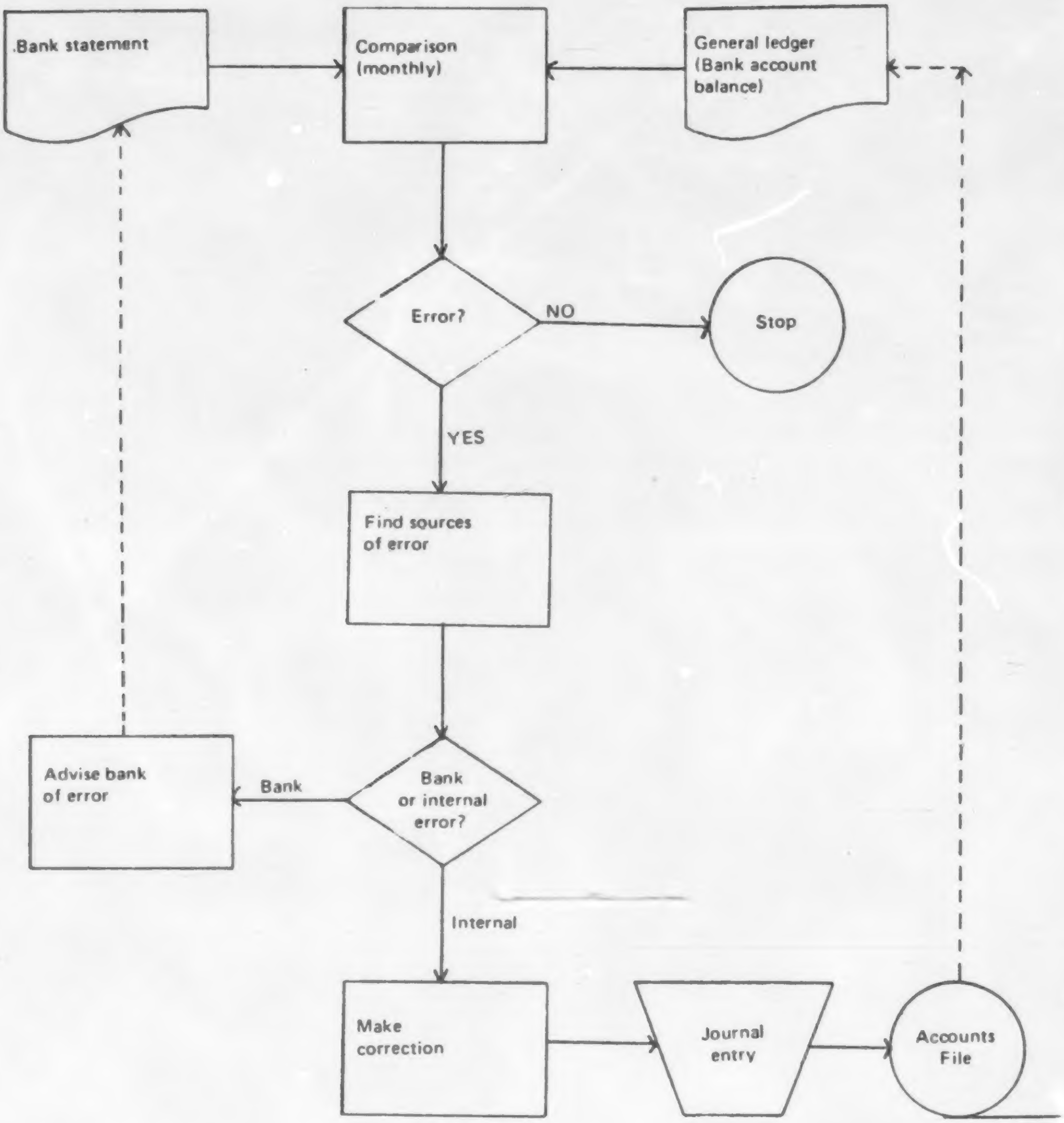
2.3.1.1 & 2.3.1.2 ACCOUNTING FUNCTION: General Accounting – Daily Borrowing & Journal Entry


Credit advice from bank
Daily borrowing from bank
Summary of bank borrowing (monthly)
Computer input (batch)
Journal entry
Loan Interest
Miscellaneous bank charges
Cancellation of cheques
Total system's cheques
Corrections and adjustments
Payroll Summary
Payroll liabilities
– net pay
– manual payroll cheques
Accounts File
update
Computer Processing
Edit lists
(Monthly)
Trial balance
General ledger transactions
Computer statements as required
A
Accounting Department for review

2.3.1.3 ACCOUNTING FUNCTION: General Accounting – General Ledger Account Analysis


A
Asset & Liability Accounts analyzed by accounting department
Budget statements analyzed by budget units
Error perceived?
NO
YES
inquiry made to budget office
Check original documents, etc.
Journal entry (Corrections)
YES
Corrections required?
NO
Stop

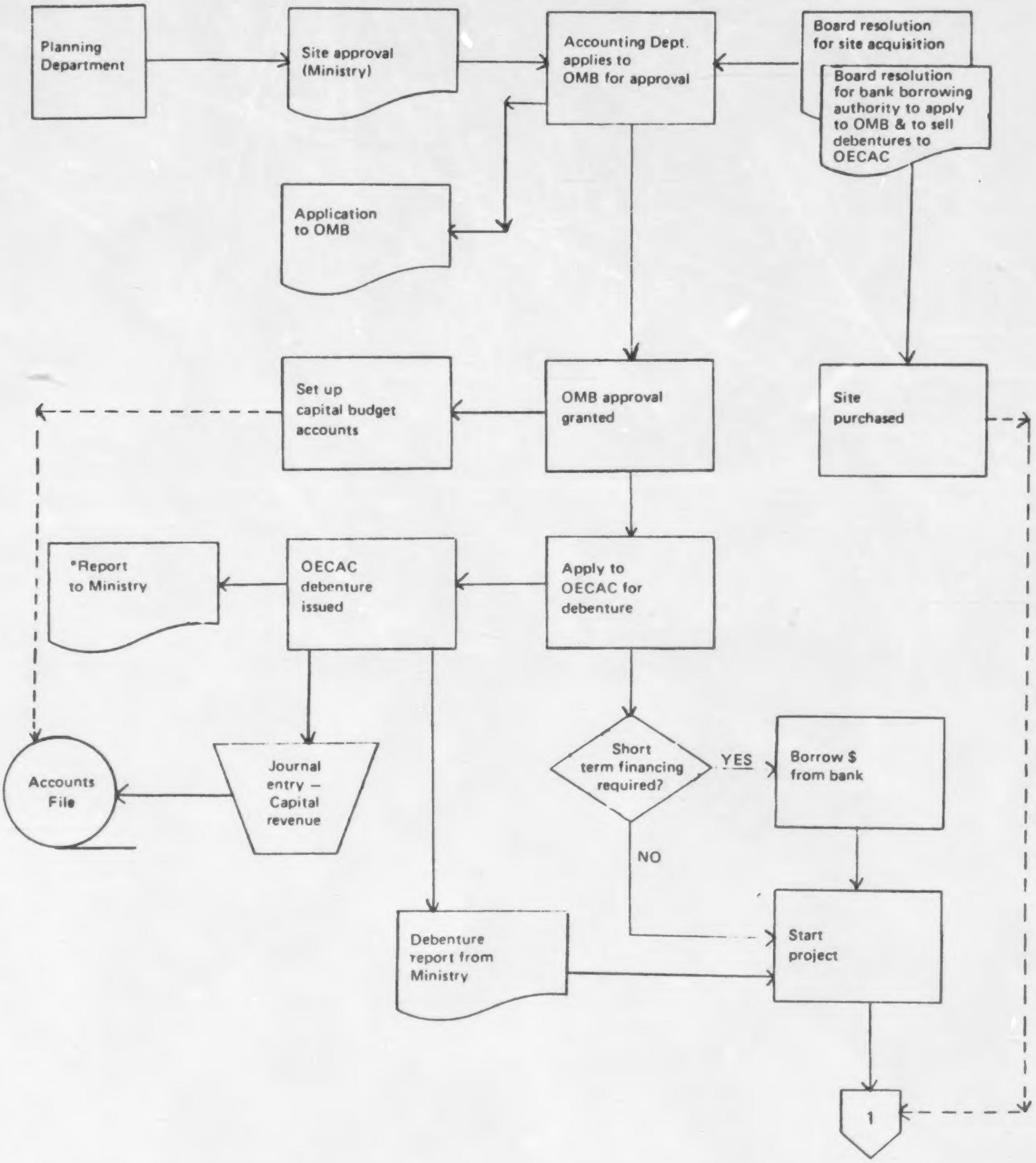
2.3.1.4 ACCOUNTING FUNCTION: General Accounting – Bank Account Reconciliation



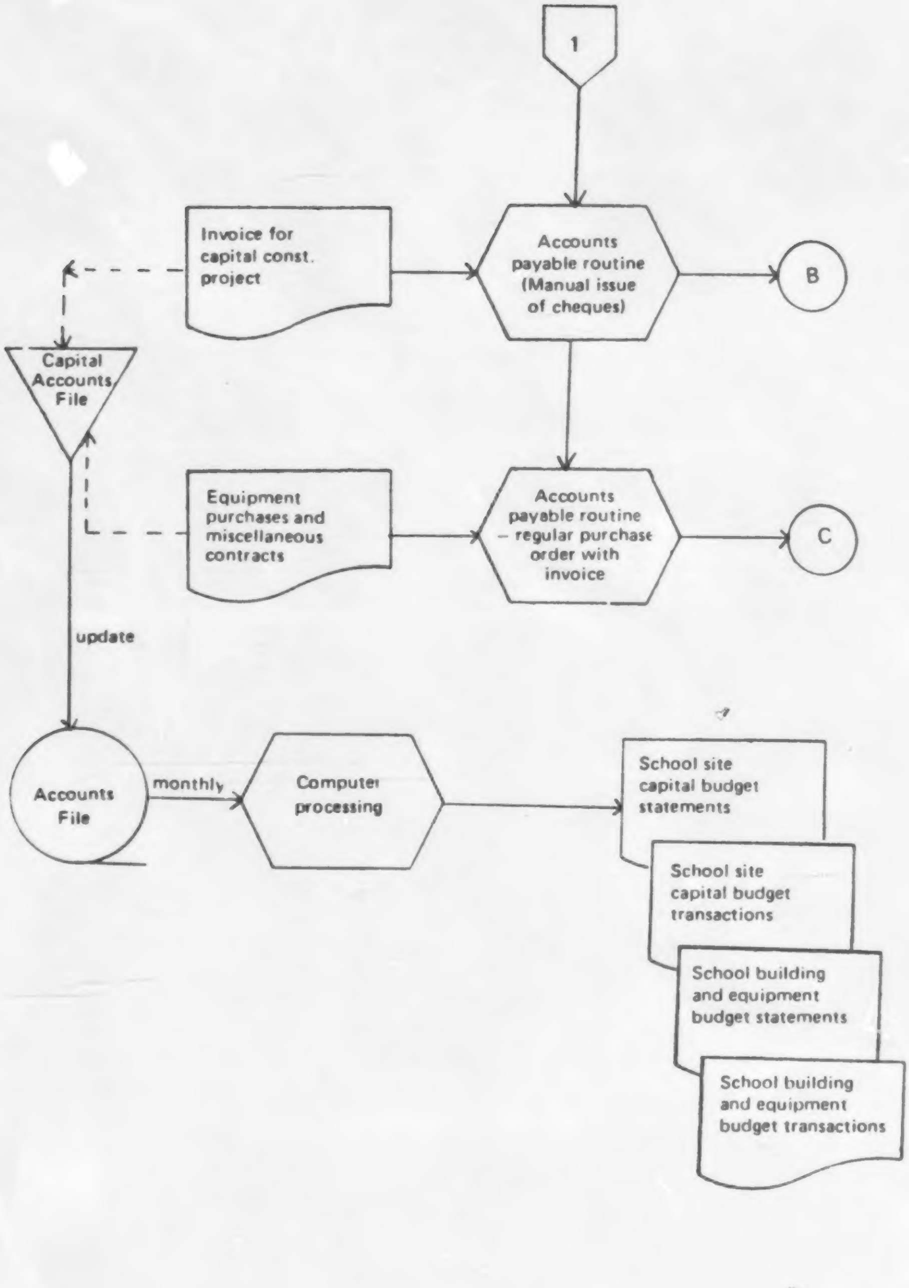
.Bank statement
Comparison (monthly)
General ledger (Bank account balance)
Error?
NO
Stop
YES
Find sources of error
Bank or internal error?
Bank
Advise bank of error
Internal
Make correction
Journal entry
Accounts File

2.3.2.1 ACCOUNTING FUNCTION: General Accounting – Capital

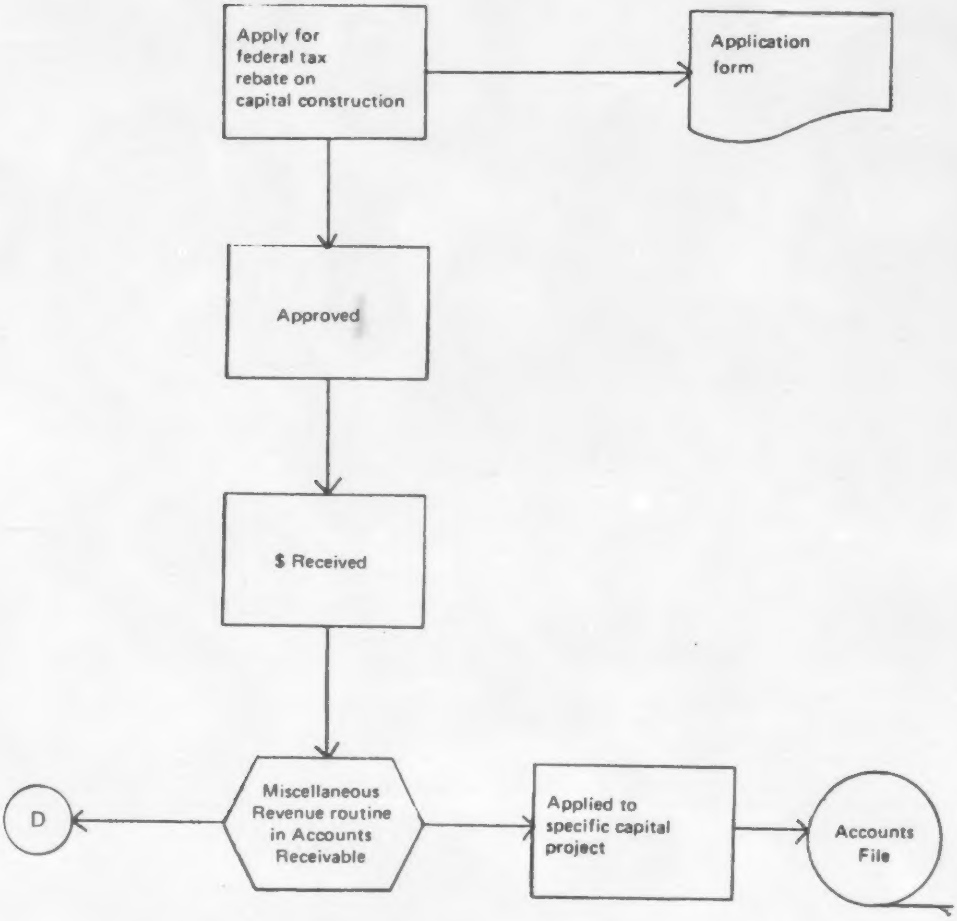
1 of 2


Planning Department
Site approval (Ministry)
Accounting Dept. applies to OMB for approval
Board resolution for site acquisition
Board resolution for bank borrowing authority to apply to OMB & to sell debentures to OECAC
Application to OMB
Set up capital budget accounts
OMB approval granted
Site purchased
*Report to Ministry
OECAC debenture issued
Apply to OECAC for debenture
Accounts File
Journal entry – Capital revenue
Short term financing required?
YES
Borrow $ from bank
NO
Debenture report from Ministry
Start project
1

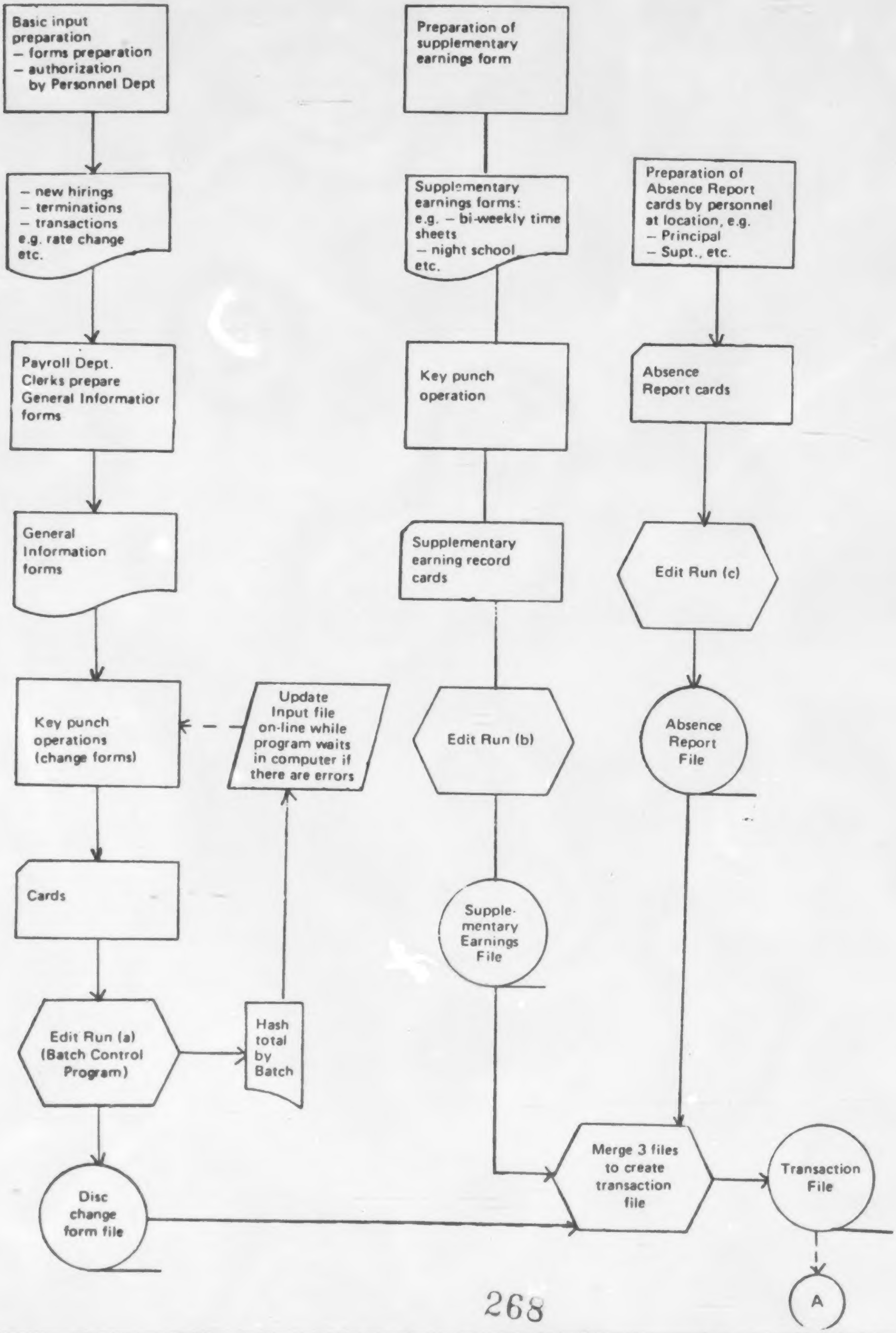
2.3.2.1 (cont'd)


1
Invoice for capital const. project
Accounts payable routine (Manual issue of cheques)
B
Capital Accounts File
Equipment purchases and miscellaneous contracts
Accounts payable routine – regular purchase order with invoice
C
update
Accounts File
monthly
Computer processing
School site capital budget statements
School site capital budget transactions
School building and equipment budget statements
School building and equipment budget transactions

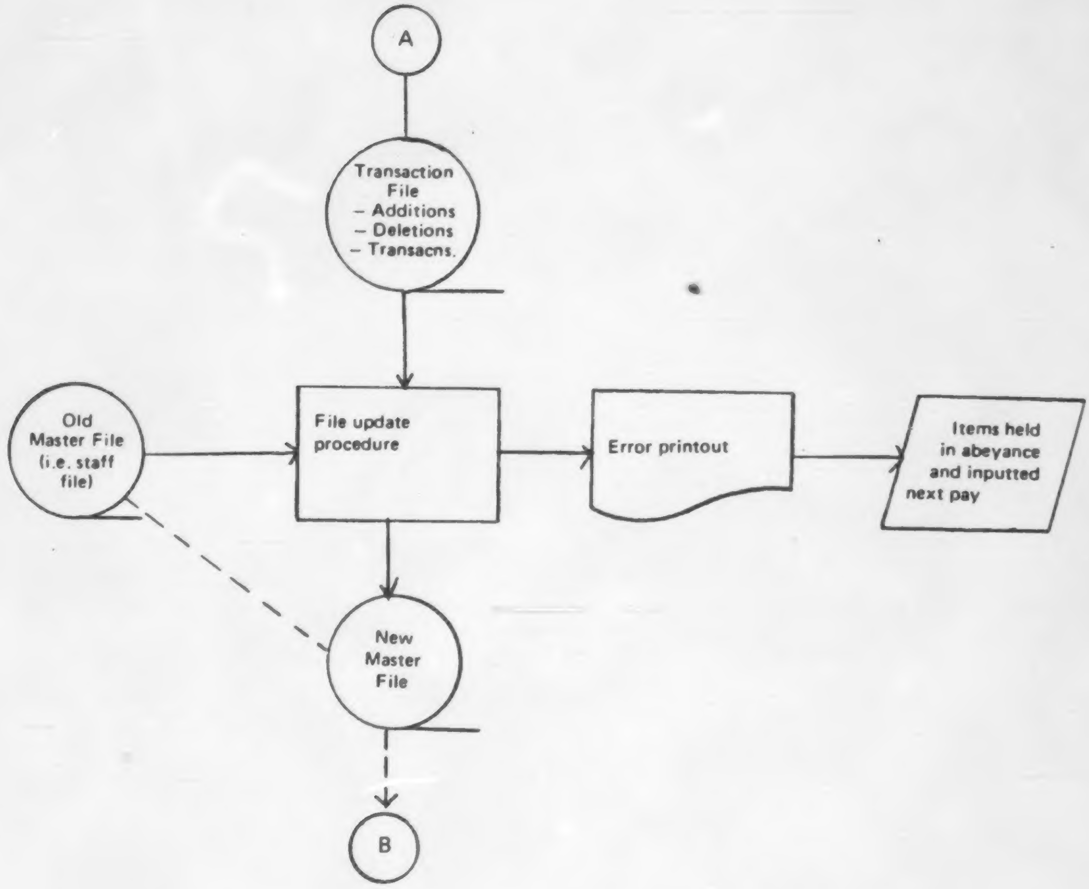
2.3.2.2 ACCOUNTING FUNCTION: General Accounting – Sales Tax Rebate Routine on Capital Construction


Apply for federal tax rebate on capital construction
Application form
Approved
$ Received
D
Miscellaneous Revenue routine in Accounts Receivable
Applied to specific capital project
Accounts File

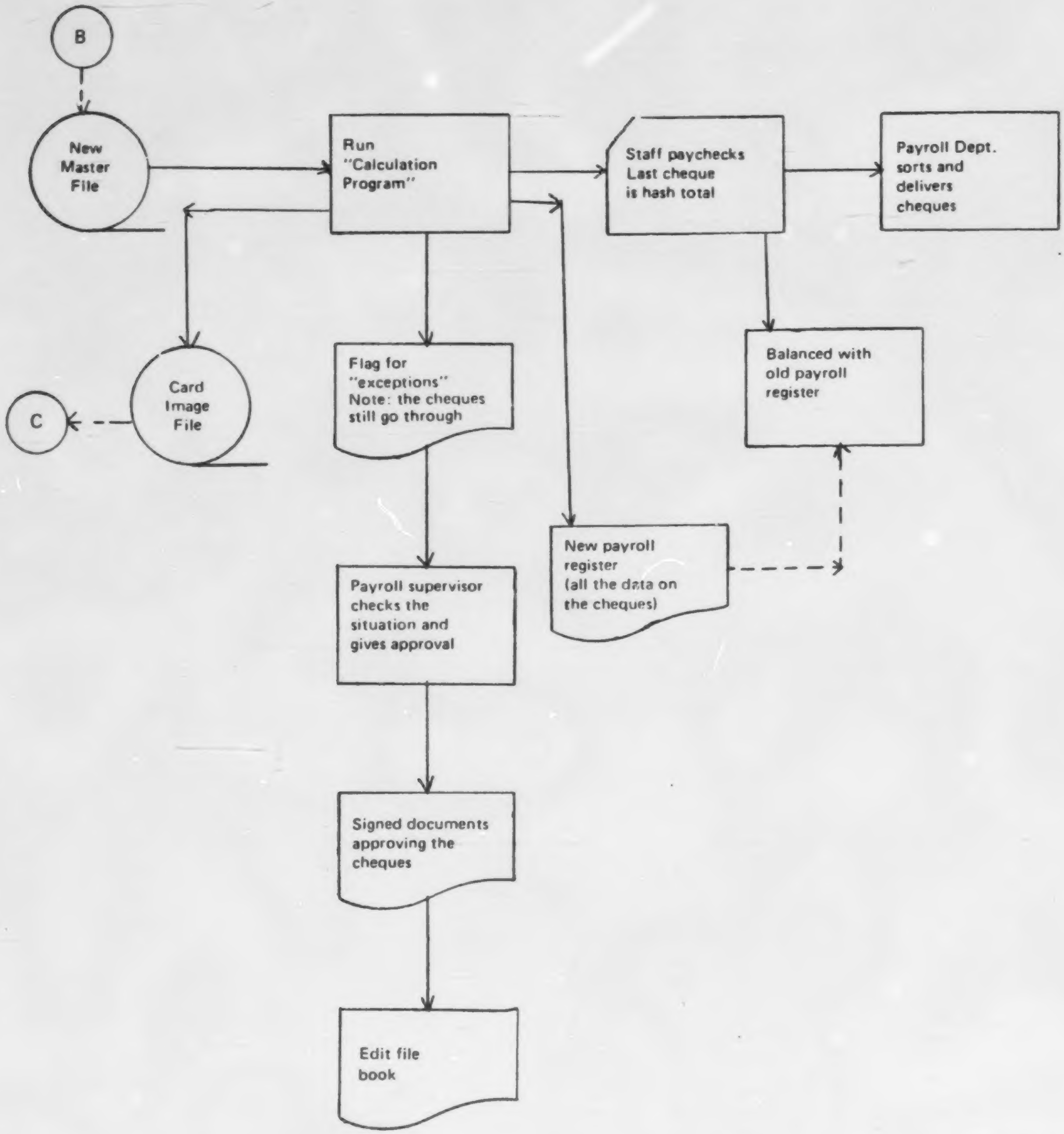
2.4.1 ACCOUNTING FUNCTION: Payroll – Phase I – Create Transaction File


Basic input preparation
– forms preparation
– authorization by Personnel Dept
– new hirings
– terminations
– transactions e.g. rate change etc.
Payroll Dept. Clerks prepare General Informatior forms
General Information forms
Key punch operations (change forms)
Update Input file on-line while program waits in computer if there are errors
Cards
Edit Run (a) (Batch Control Program)
Hash total by Batch
Disc change form file
Preparation of supplementary earnings form
Supplementary earnings forms: e.g. – bi-weekly time sheets
– night school etc.
Key punch operation
Supplementary earning record cards
Edit Run (b)
Supple-mentary Earnings File
Preparation of Absence Report cards by personnel at location, e.g.
– Principal
– Supt., etc.
Absence Report cards
Edit Run (c)
Absence Report File
Merge 3 files to create transaction file
Transaction File
A

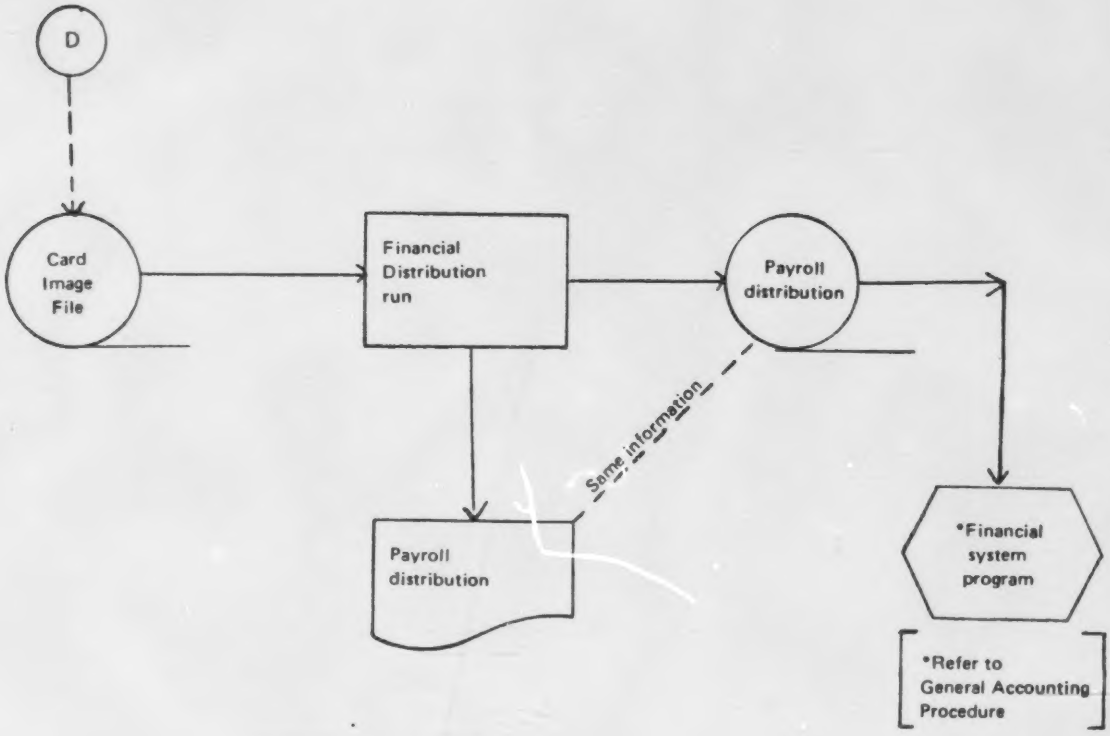
2.4.2 ACCOUNTING FUNCTION: Payroll – Phase II – Master File Update


A
Transaction File
– Additions
– Deletions
– Transacns.
Old Master File (i.e. staff file)
File update procedure
Error printout
Items held in abeyance and inputted next pay
New Master File
B

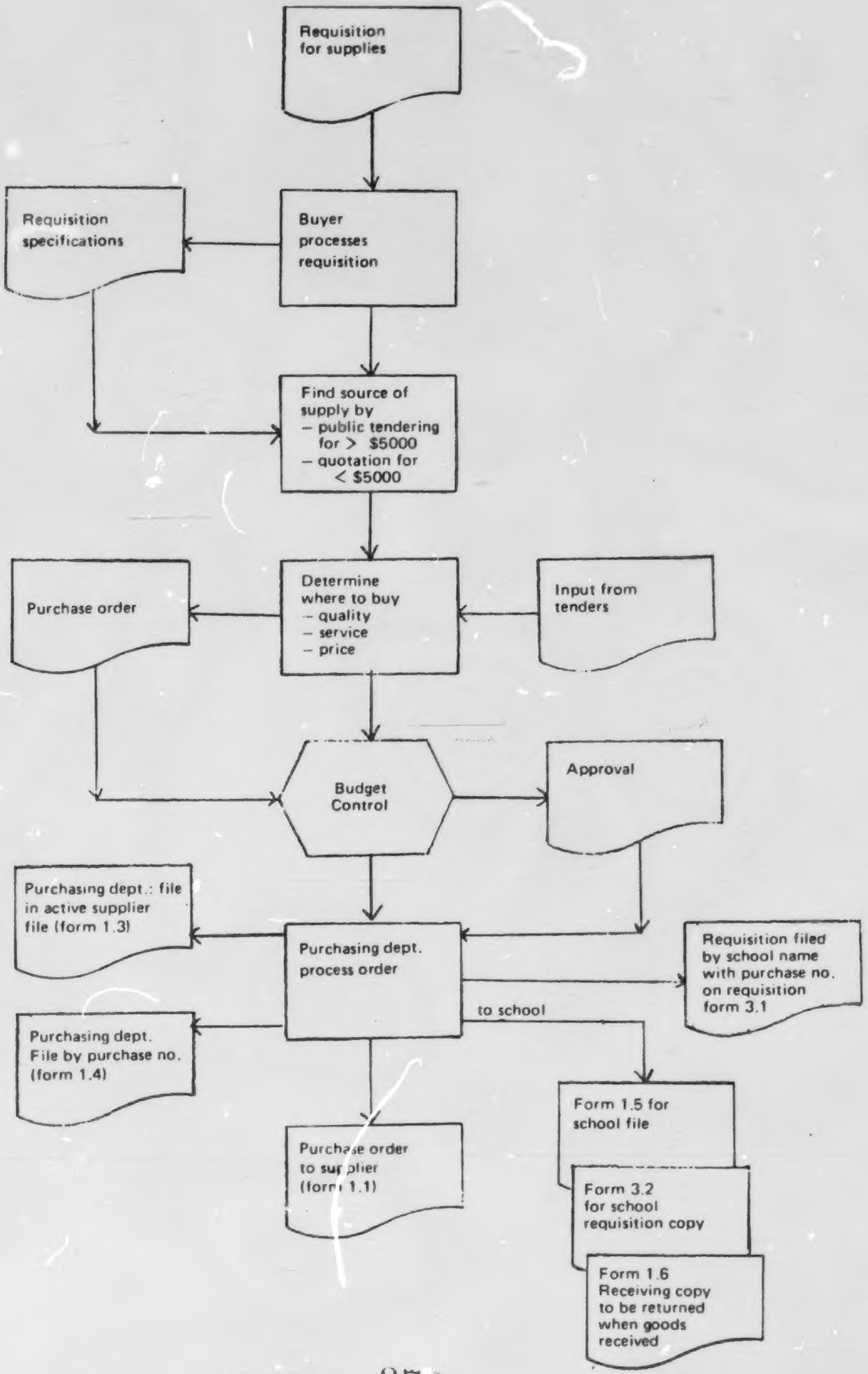
2.4.3 ACCOUNTING FUNCTION: Payroll — Phase III — Preparation of Paychecks


B
New Master File
Run "Calculation Program"
Staff paychecks Last cheque is hash total
Payroll Dept. sorts and delivers cheques
Card Image File
C
Flag for "exceptions" Note: the cheques still go through
Balanced with old payroll register
New payroll register (all the data on the cheques)
Payroll supervisor checks the situation and gives approval
Signed documents approving the cheques
Edit file book

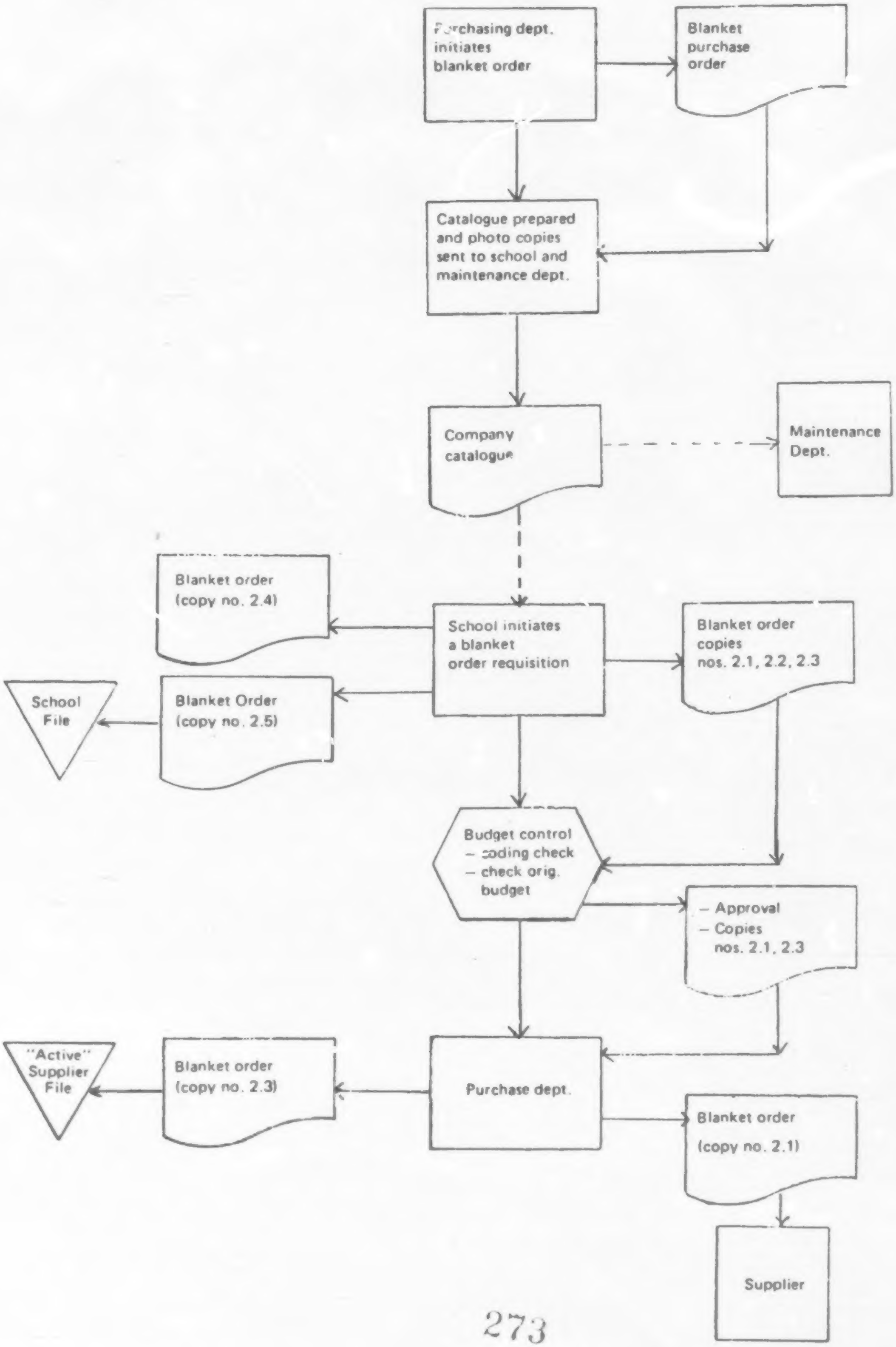
2.4.4 ACCOUNTING FUNCTION: Payroll – Phase IV – Financial Distribution Report


D
Card Image File
Financial Distribution run
Payroll distribution
Same information
Payroll distribution
*Financial system program
*Refer to General Accounting Procedure

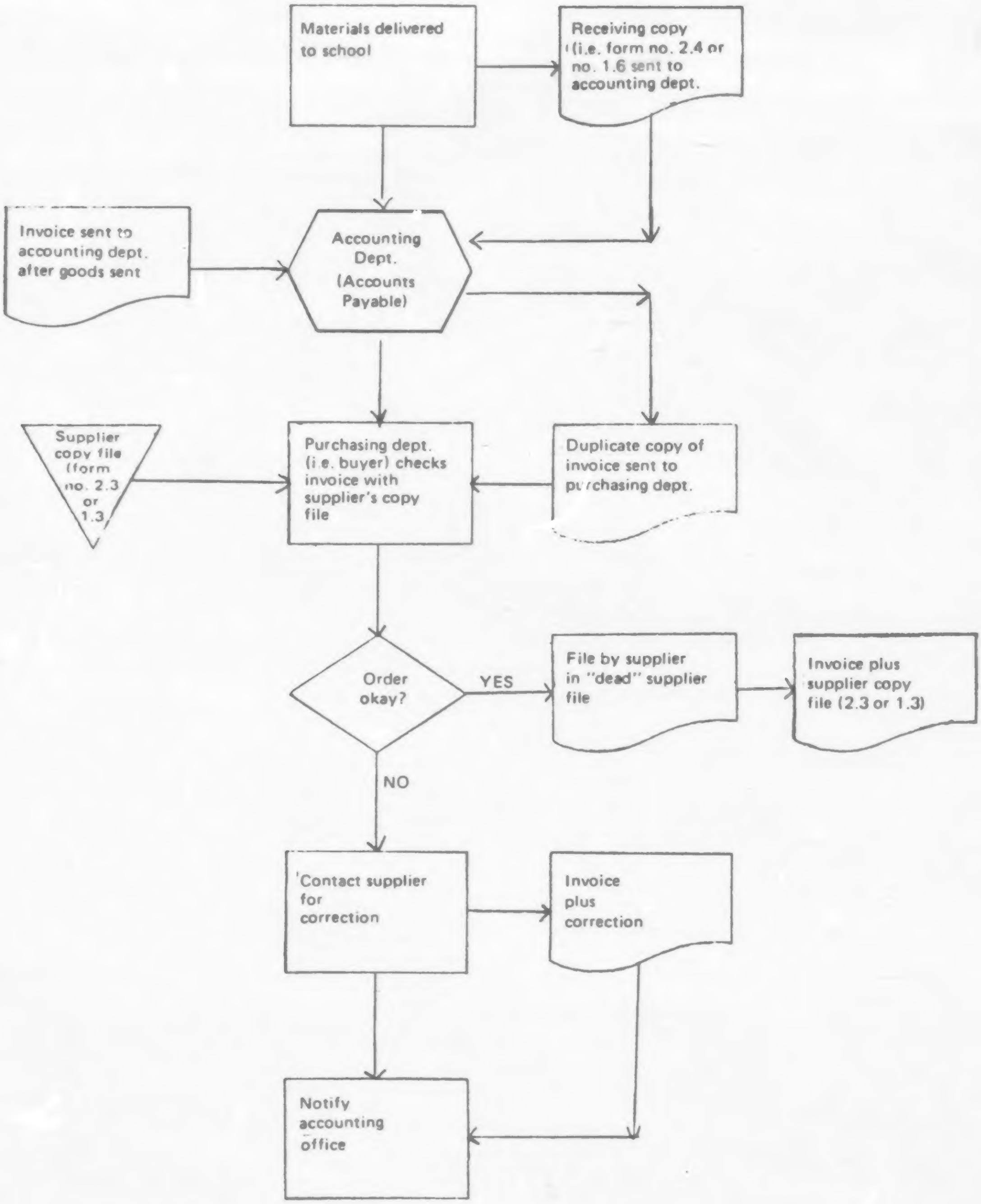
3.1.1 SUPPLY FUNCTION: Purchasing – General Procedure


Requisition for supplies
Buyer processes requisition
Requisition specifications
Find source of supply by
– public tendering for > $5000
– quotation for < $5000
Determine where to buy
– quality
– service
– price
Purchase order
Input from tenders
Budget Control
Approval
Purchasing dept.: file in active supplier file (form 1.3)
Purchasing dept. process order
Requisition filed by school name with purchase no. on requisition form 3.1
to school
Purchasing dept. File by purchase no. (form 1.4)
Purchase order to supplier (form 1.1)
Form 1.5 for school file
Form 3.2 for school requisition copy
Form 1.6 Receiving copy to be returned when goods received

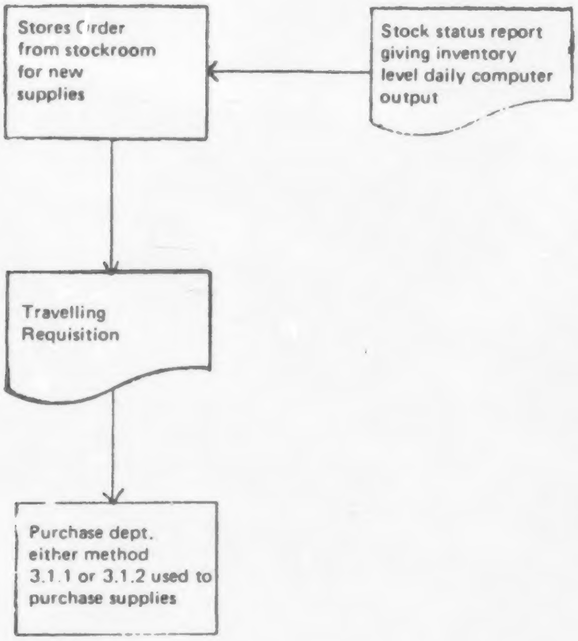
3.1.2 SUPPLY FUNCTION: Purchasing – Blanket Ordering Method for Purchasing


Purchasing dept. initiates blanket order
Blanket purchase order
Catalogue prepared and photo copies sent to school and maintenance dept.
Company catalogue
Maintenance Dept.
Blanket order (copy no. 2.4)
School initiates a blanket order requisition
Blanket order copies nos. 2.1, 2.2, 2.3
School File
Blanket Order (copy no. 2.5)
Budget control – coding check – check orig. budget
– Approval – Copies nos. 2.1, 2.3
"Active" Supplier File
Blanket order (copy no. 2.3)
Purchase dept.
Blanket order (copy no. 2.1)
Supplier

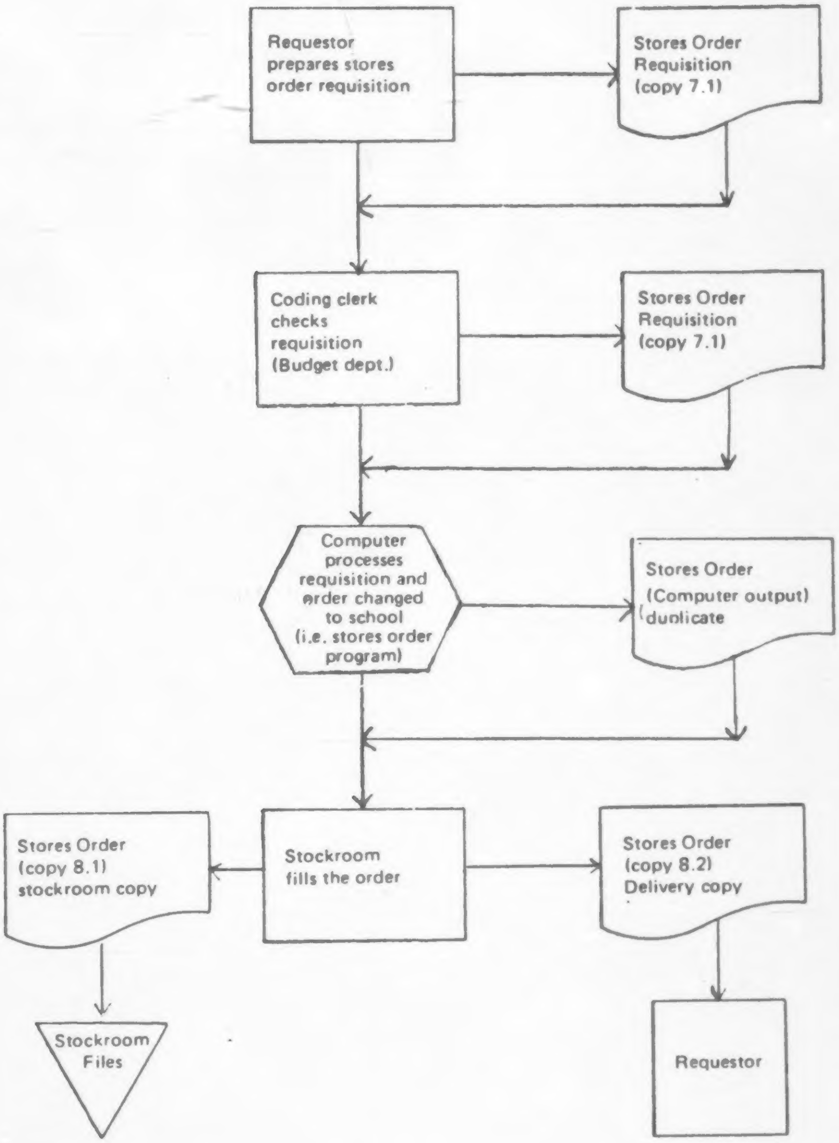
3.1.3 SUPPLY FUNCTION: Purchasing – Invoice Processing


Materials delivered to school
Receiving copy (i.e. form no. 2.4 or no. 1.6 sent to accounting dept.
Invoice sent to accounting dept. after goods sent
Accounting Dept. (Accounts Payable)
Supplier copy file (form no. 2.3 or 1.3
Purchasing dept. (i.e. buyer) checks invoice with supplier's copy file
Duplicate copy of invoice sent to purchasing dept.
Order okay?
YES
File by supplier in "dead" supplier file
Invoice plus supplier copy file (2.3 or 1.3)
NO
Contact supplier for correction
Invoice plus correction
Notify accounting office

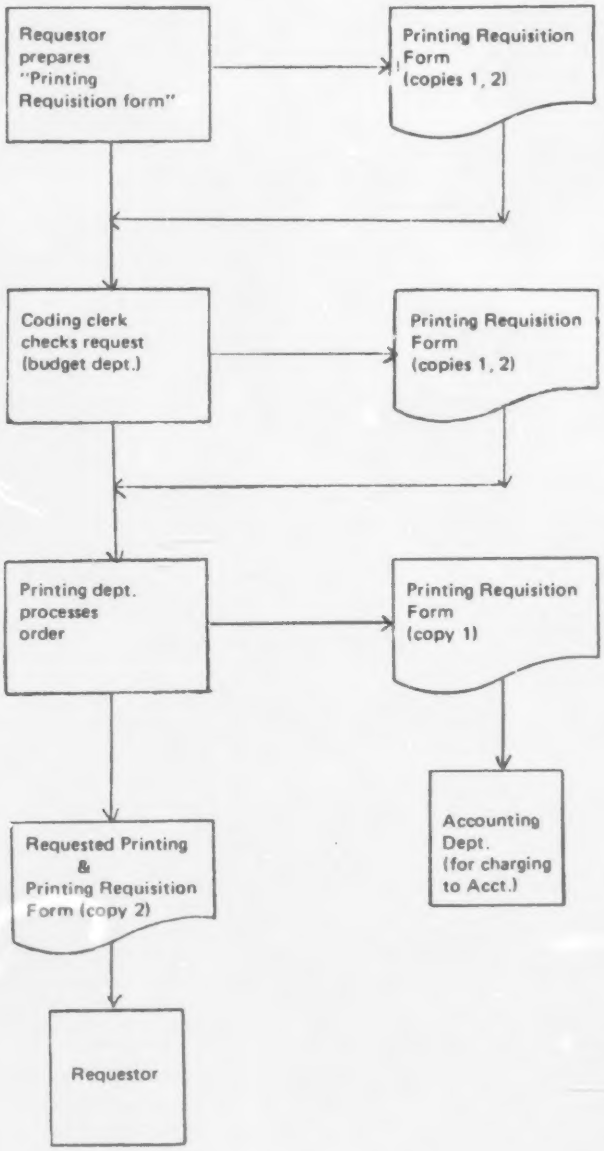
3.2.1 SUPPLY FUNCTION: Stores – Purchasing for stockroom (flow into stores)


Stores Order from stockroom for new supplies
Stock status report giving inventory level daily computer output
Travelling Requisition
Purchase dept. either method 3.1.1 or 3.1.2 used to purchase supplies

3.2.2 SUPPLY FUNCTION: Stores – Requisition of Supplies (flow out of stores)

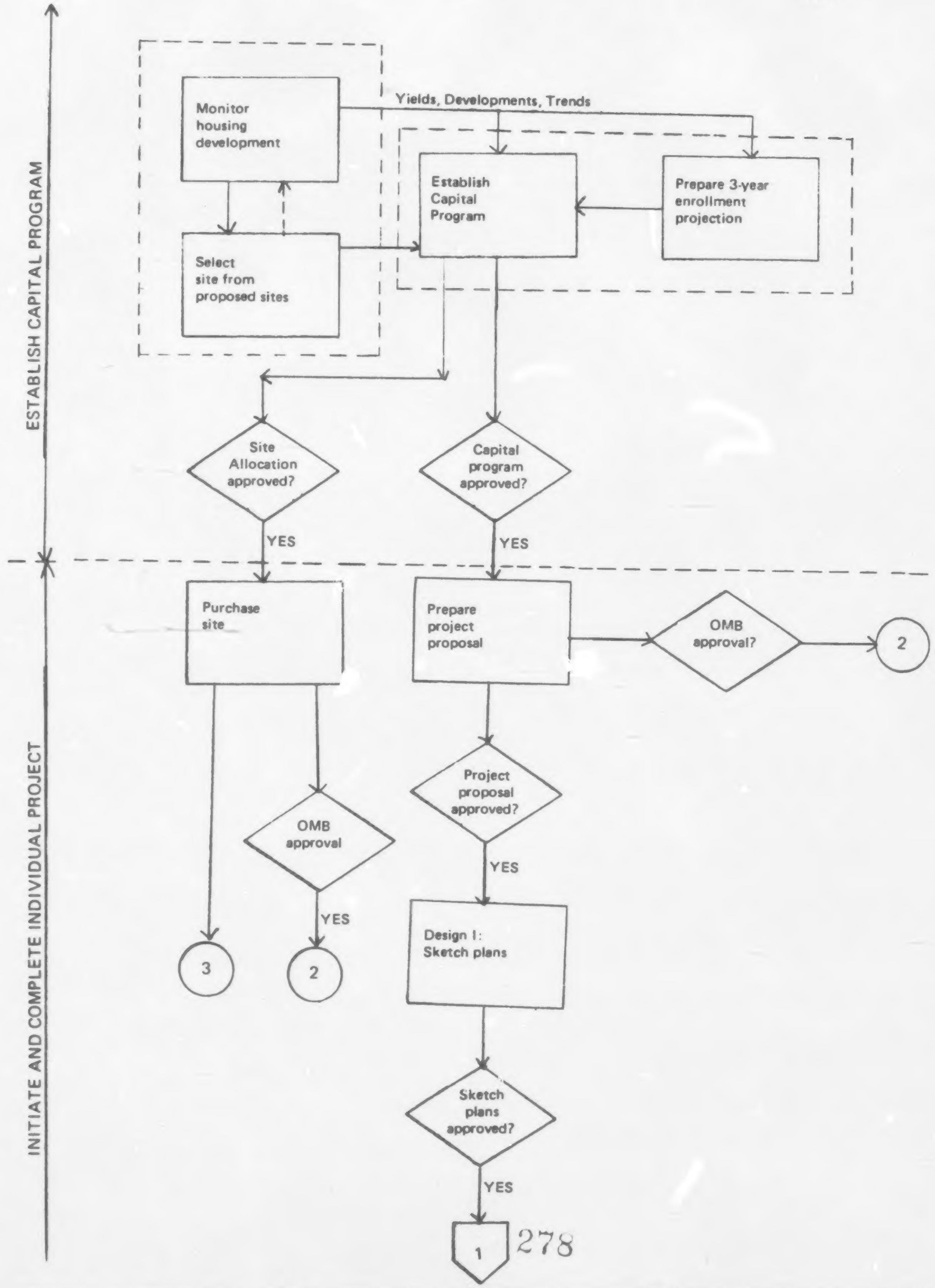

Requestor prepares stores order requisition
Stores Order Requisition (copy 7.1)
Coding clerk checks requisition (Budget dept.)
Stores Order Requisition (copy 7.1)
Computer processes requisition and order changed to school (i.e. stores order program)
Stores Order (Computer output) duplicate
Stores Order (copy 8.1) stockroom copy
Stockroom fills the order
Stores Order (copy 8.2) Delivery copy
Stockroom Files
Requestor

3.3 SUPPLY FUNCTION: Request for Printing Services


Requestor prepares "Printing Requisition form"
Printing Requisition Form (copies 1, 2)
Coding clerk checks request (budget dept.)
Printing Requisition Form (copies 1, 2)
Printing dept. processes order
Printing Requisition Form (copy 1)
Requested Printing & Printing Requisition Form (copy 2)
Accounting Dept. (for charging to Acct.)
Requestor

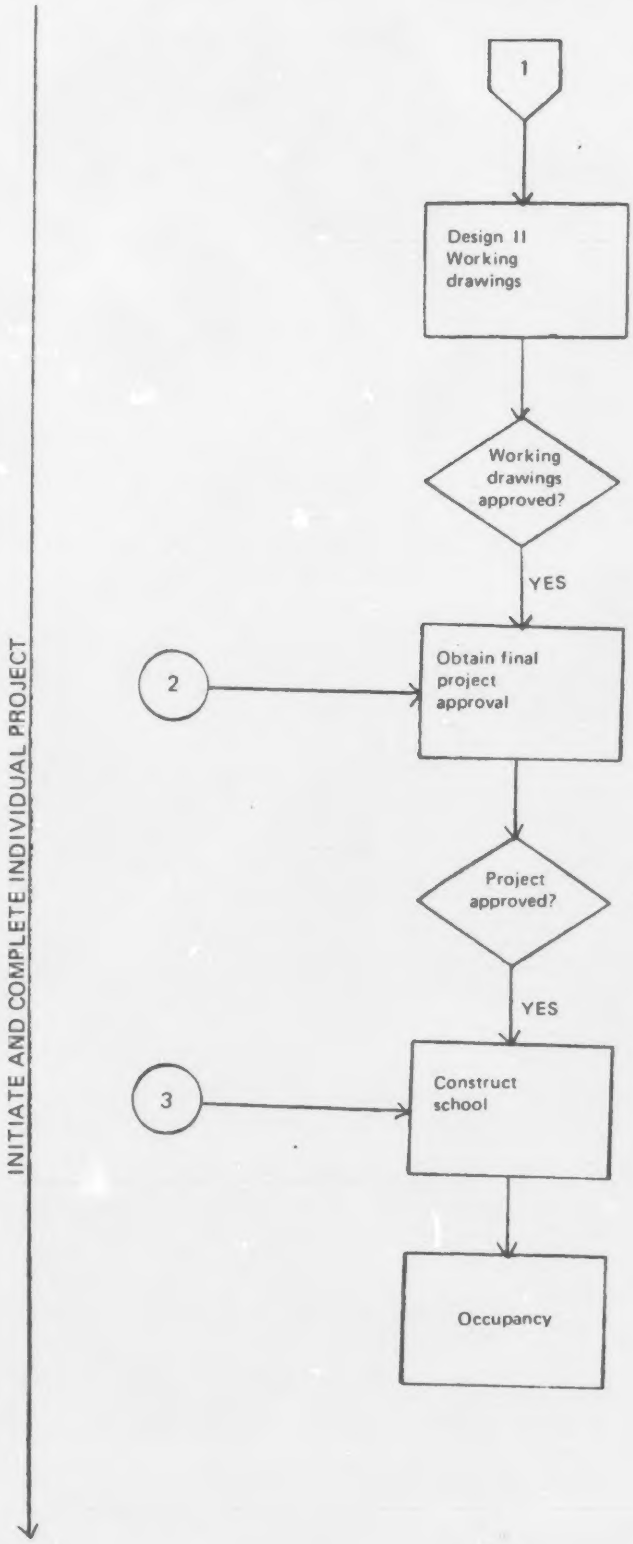
4.1 ACCOMMODATION SUPPLY: Capital Program

1 of 2


ESTABLISH CAPITAL PROGRAM
INITIATE AND COMPLETE INDIVIDUAL PROJECT
Monitor housing development
Yields, Developments, Trends
Establish Capital Program
Prepare 3-year enrollment projection
Select site from proposed sites
Site Allocation approved?
Capital program approved?
YES
YES
Purchase site
Prepare project proposal
OMB approval?
2
Project proposal approved?
OMB approval
YES
YES
3
2
Design I: Sketch plans
Sketch plans approved?
YES
1

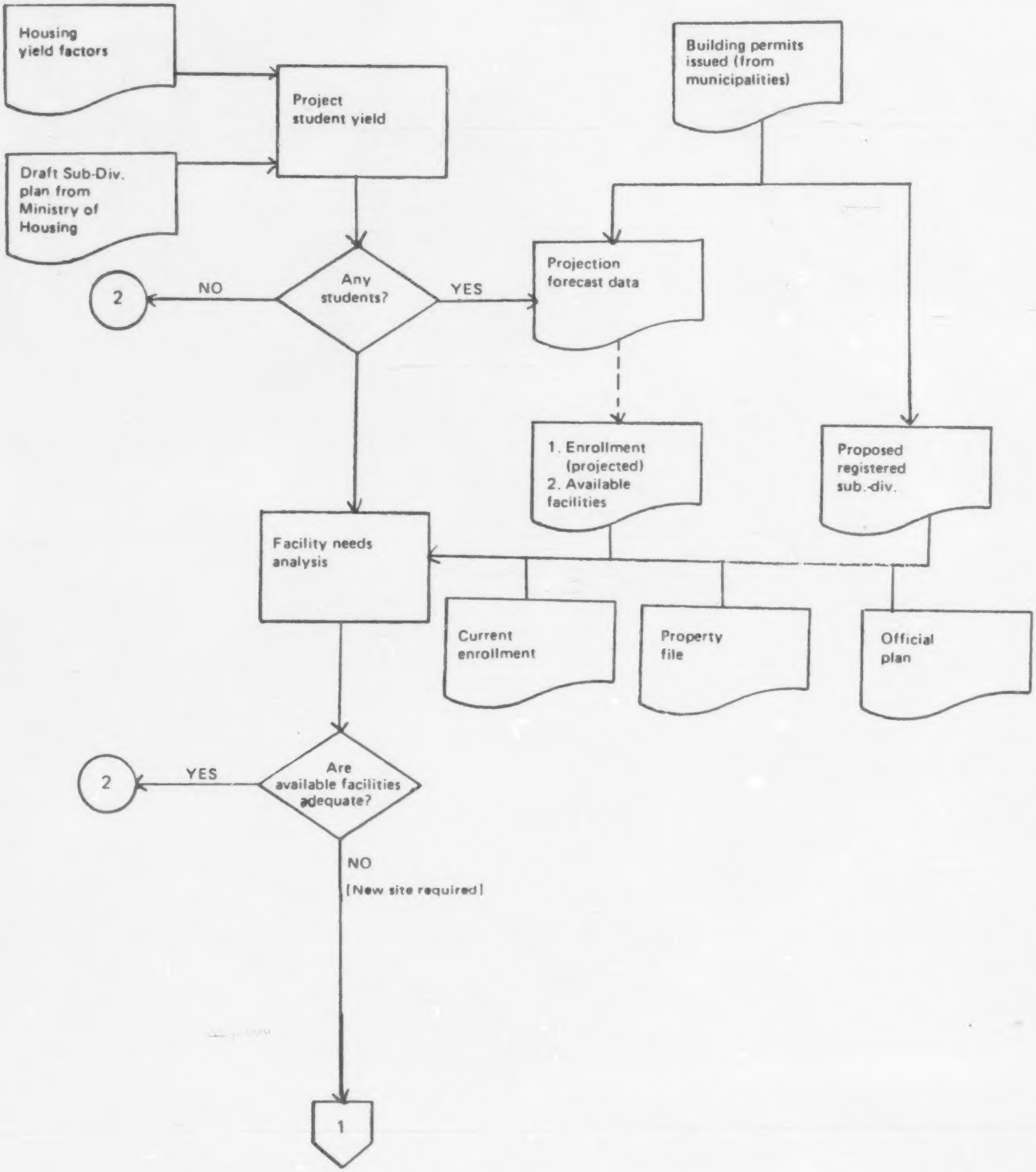
4.1 (cont'd)

2 of 2


INITIATE AND COMPLETE INDIVIDUAL PROJECT
1
Design II Working drawings
Working drawings approved?
YES
2
Obtain final project approval
Project approved?
YES
3
Construct school
Occupancy

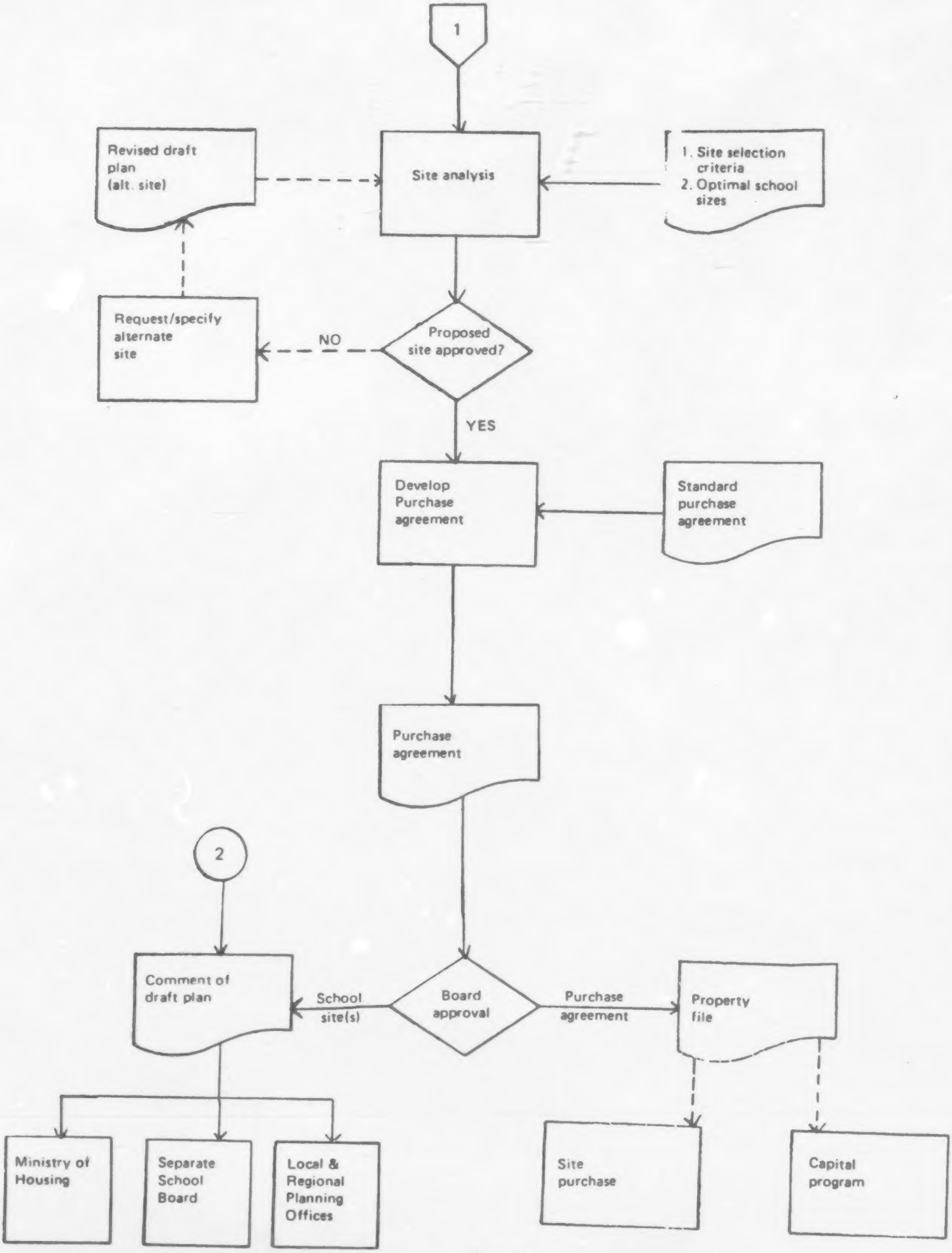
4.1.1 & 4.1.2 ACCOMMODATION SUPPLY: Capital Program – Monitor Housing Development/Site Selection

1 of 2

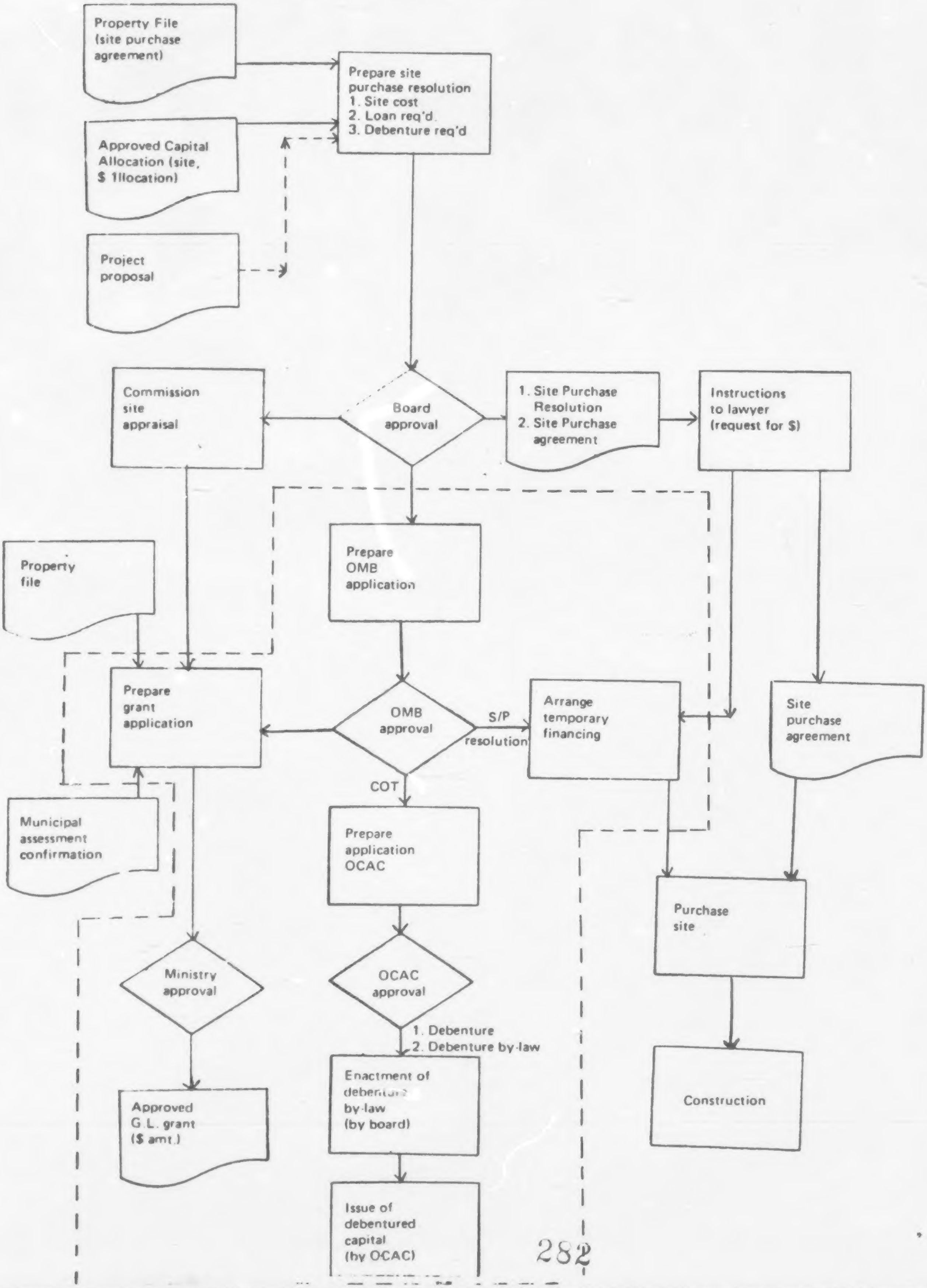

Housing yield factors
Project student yield
Draft Sub-Div. plan from Ministry of Housing
Building permits issued (from municipalities)
Any students?
NO
2
YES
Projection forecast data
1. Enrollment (projected)
2. Available facilities
Proposed registered sub.-div.
Facility needs analysis
Current enrollment
Property file
Official plan
Are available facilities adequate?
YES
2
NO
[New site required]
1

4.1.1 & 4.1.2 (cont'd)

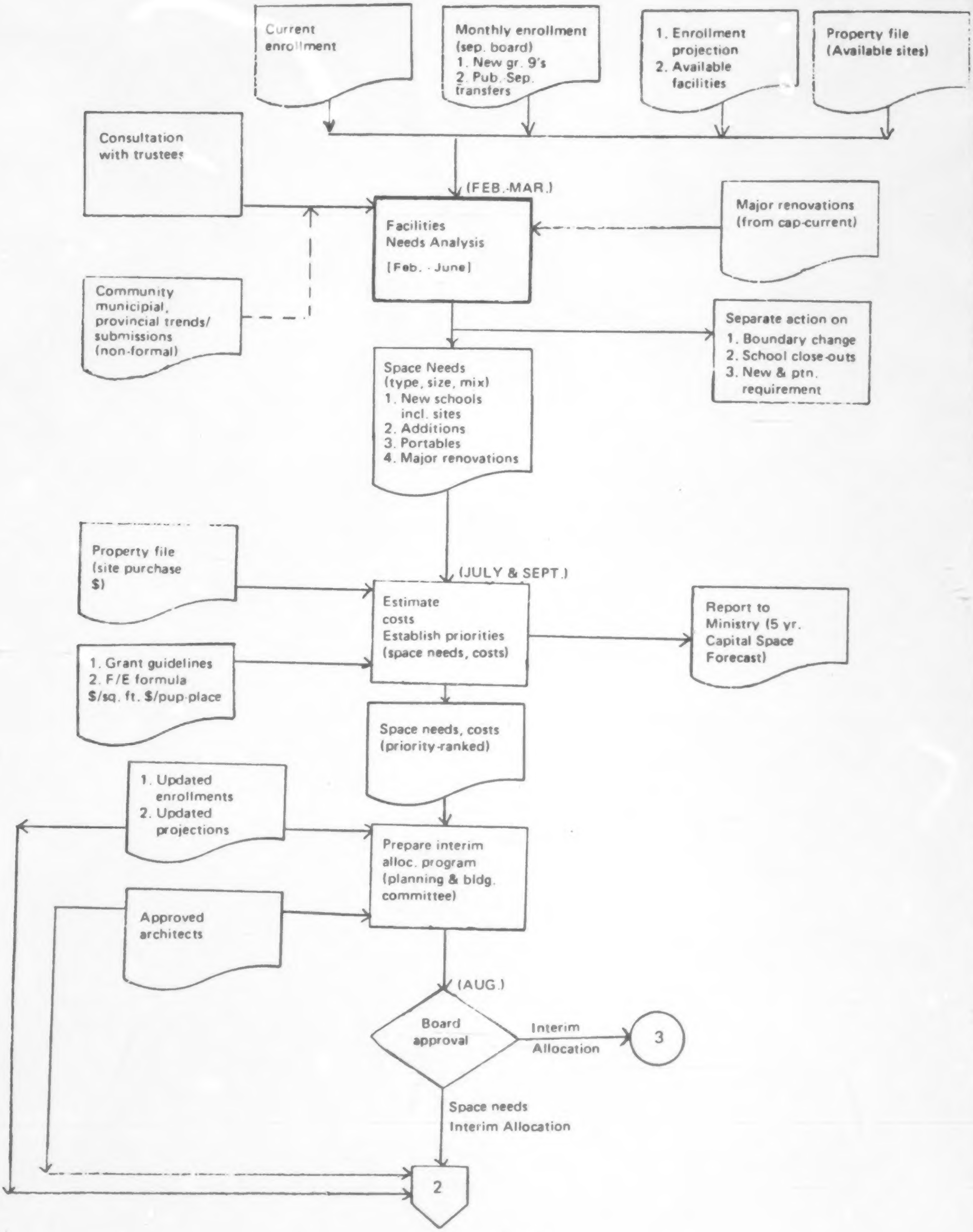
2 of 2


1
Revised draft plan (alt. site)
Site analysis
1. Site selection criteria
2. Optimal school sizes
Request/specify alternate site
NO
Proposed site approved?
YES
Develop Purchase agreement
Standard purchase agreement
Purchase agreement
2
Comment of draft plan
School site(s)
Board approval
Purchase agreement
Property file
Ministry of Housing
Separate School Board
Local & Regional Planning Offices
Site purchase
Capital program

4.1.2.1 ACCOMMODATION SUPPLY: Capital Program – Site Purchase

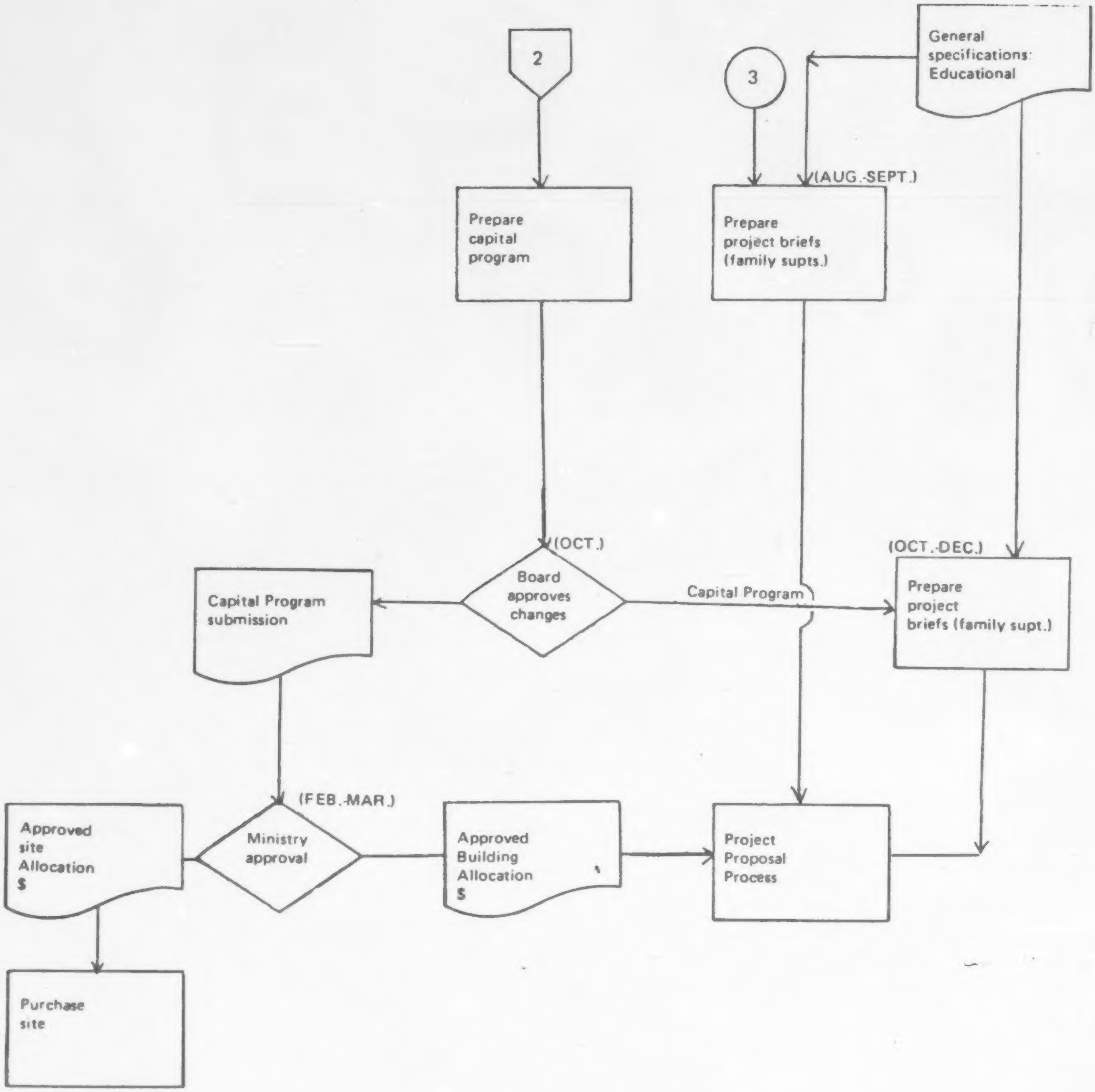

Property File (site purchase agreement)
Prepare site purchase resolution
1. Site cost
2. Loan req'd.
3. Debenture req'd
Approved Capital Allocation (site, $ 1llocation)
Project proposal
Commission site appraisal
Board approval
1. Site Purchase Resolution
2. Site Purchase agreement
Instructions to lawyer (request for $)
Prepare OMB application
Property file
Prepare grant application
OMB approval
S/P resolution
Arrange temporary financing
Site purchase agreement
COT
Municipal assessment confirmation
Prepare application OCAC
Purchase site
Ministry approval
OCAC approval
1. Debenture
2. Debenture by-law
Enactment of debenture by-law (by board)
Construction
Approved G.L. grant ($ amt.)
Issue of debentured capital (by OCAC)

4.1.3 ACCOMMODATION SUPPLY: Capital Program – Establish capital program

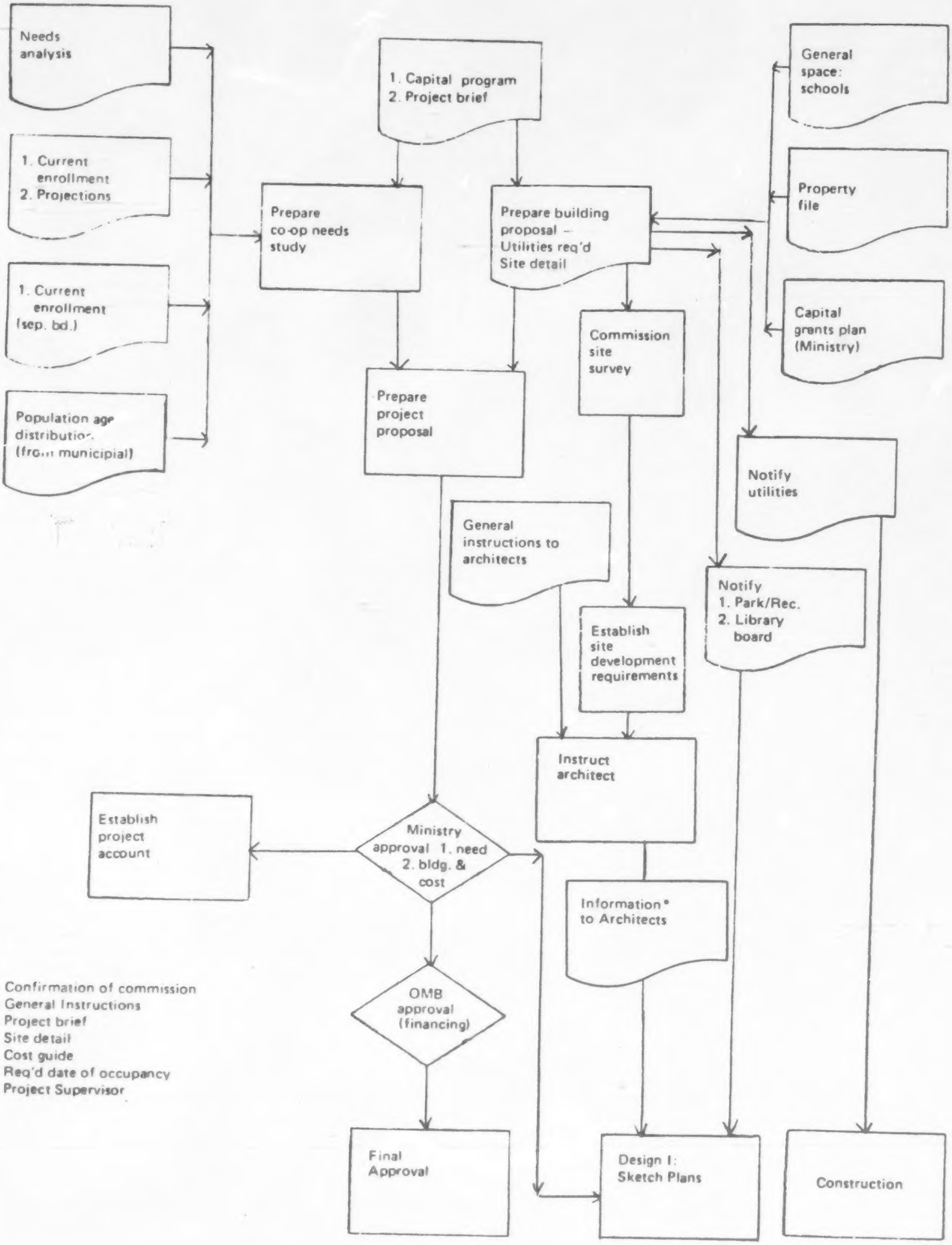

Current enrollment
Monthly enrollment (sep. board) 1. New gr. 9's 2. Pub. Sep. transfers
1. Enrollment projection 2. Available facilities
Property file (Available sites)
Consultation with trustees
(FEB.-MAR.)
Facilities Needs Analysis [Feb. - June]
Major renovations (from cap-current)
Community municipial, provincial trends/ submissions (non-formal)
Separate action on 1. Boundary change 2. School close-outs 3. New & ptn. requirement
Space Needs (type, size, mix) 1. New schools incl. sites 2. Additions 3. Portables 4. Major renovations
Property file (site purchase $)
(JULY & SEPT.)
Estimate costs Establish priorities (space needs, costs)
Report to Ministry (5 yr. Capital Space Forecast)
1. Grant guidelines 2. F/E formula $/sq. ft. $/pup-place
Space needs, costs (priority-ranked)
1. Updated enrollments 2. Updated projections
Prepare interim alloc. program (planning & bldg. committee)
Approved architects
(AUG.)
Board approval
Interim Allocation
3
Space needs Interim Allocation
2

4.1.3 (cont'd)

2 of 2


2
3
General specifications: Educational
(AUG.-SEPT.)
Prepare capital program
Prepare project briefs (family supts.)
(OCT.)
Board approves changes
Capital Program
(OCT.-DEC.)
Capital Program submission
Prepare project briefs (family supt.)
(FEB.-MAR.)
Approved site Allocation $
Ministry approval
Approved Building Allocation $
Project Proposal Process
Purchase site

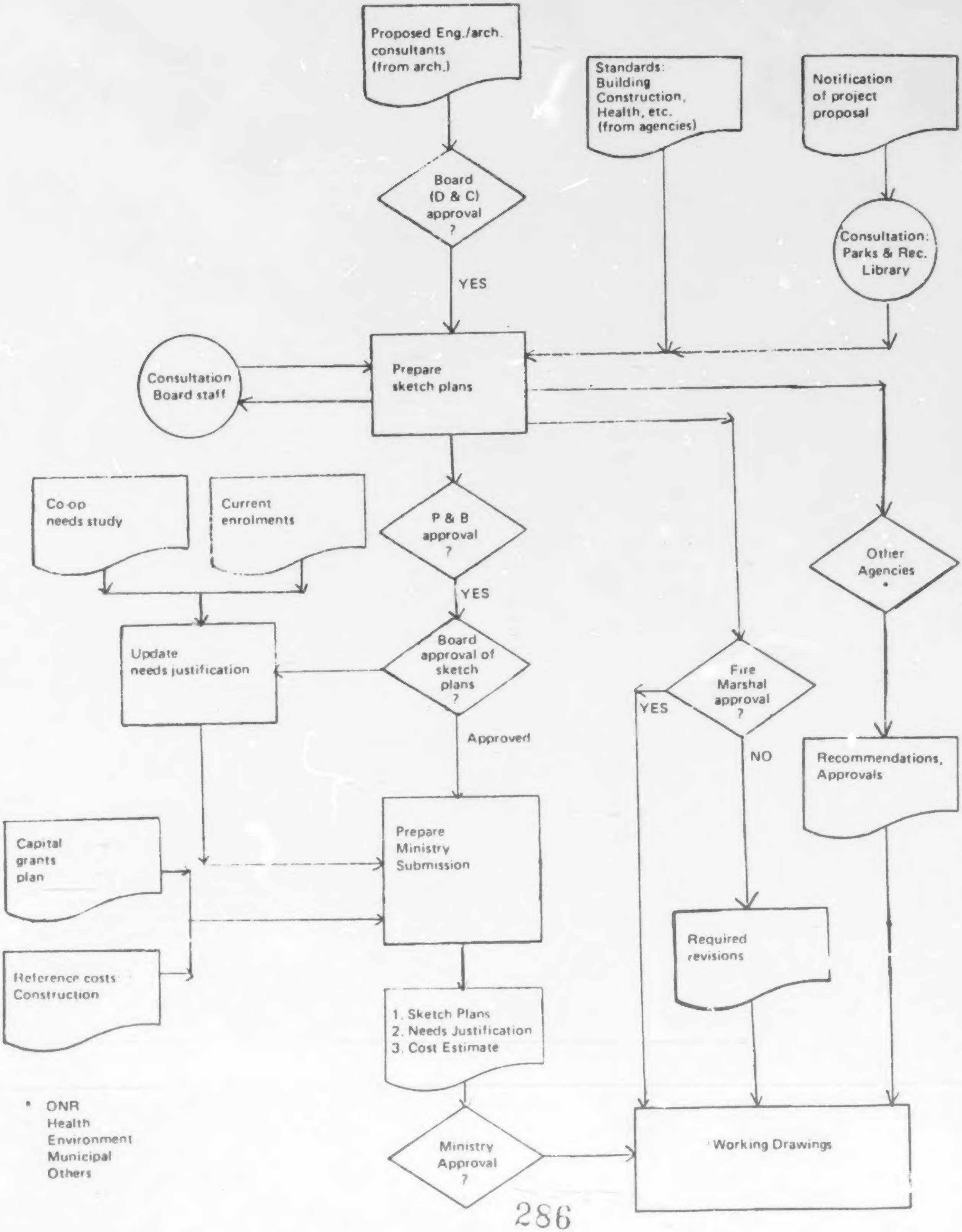
4.1.4 ACCOMMODATION SUPPLY: Capital Program – Project Proposal Process


Needs analysis
1. Current enrollment
2. Projections
1. Current enrollment (sep. bd.)
Population age distribution (from municipial)
1. Capital program
2. Project brief
Prepare co-op needs study
Prepare building proposal – Utilities req'd Site detail
General space: schools
Property file
Capital grants plan (Ministry)
Commission site survey
Prepare project proposal
Notify utilities
General instructions to architects
Establish site development requirements
Notify
1. Park/Rec.
2. Library board
Instruct architect
Establish project account
Ministry approval 1. need 2. bldg. & cost
Information* to Architects
OMB approval (financing)
Final Approval
Design I: Sketch Plans
Construction

*

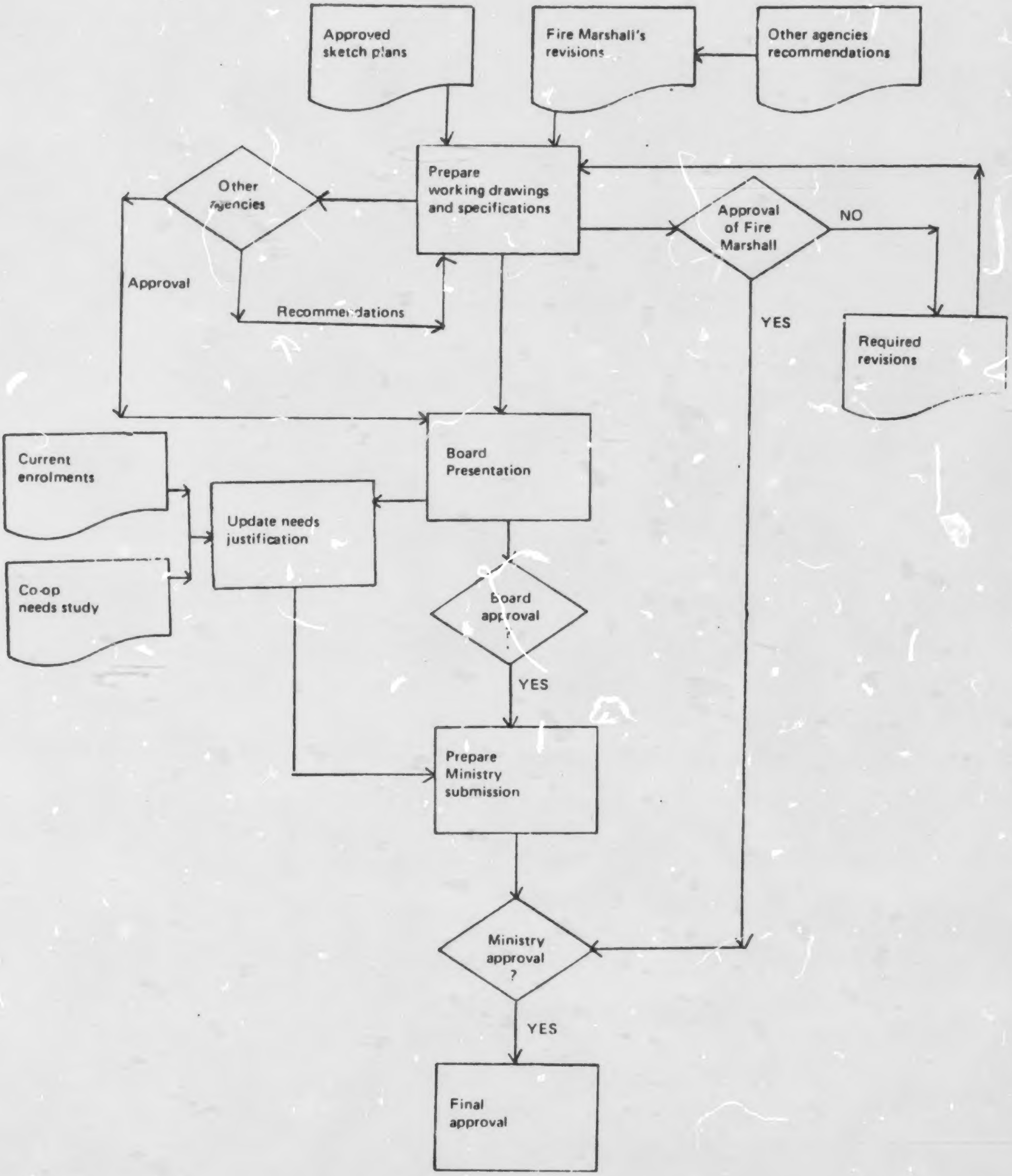
1. Confirmation of commission
2. General Instructions
3. Project brief
4. Site detail
5. Cost guide
6. Req'd date of occupancy
7. Project Supervisor

4.1.5 ACCOMMODATION SUPPLY: Capital Program – Design I (Sketch Plans)

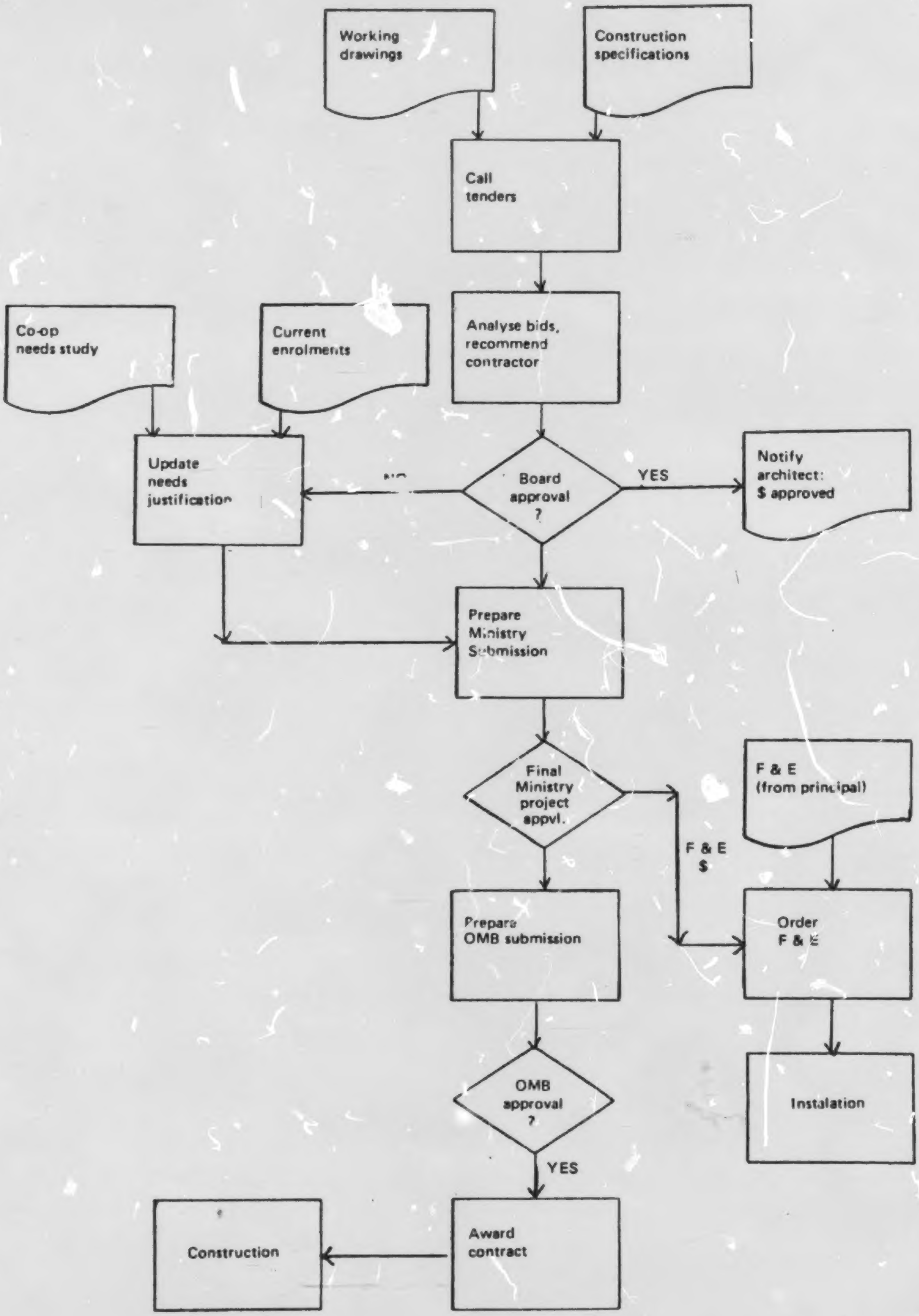

Proposed Eng./arch. consultants (from arch.)
Standards: Building Construction, Health, etc. (from agencies)
Notification of project proposal
Board (D & C) approval ?
YES
Consultation: Parks & Rec. Library
Consultation Board staff
Prepare sketch plans
Co-op needs study
Current enrolments
P & B approval ?
YES
Other Agencies *
Update needs justification
Board approval of sketch plans ?
Fire Marshal approval ?
YES
NO
Approved
Recommendations, Approvals
Capital grants plan
Prepare Ministry Submission
Required revisions
Reference costs: Construction
1. Sketch Plans
2. Needs Justification
3. Cost Estimate
Ministry Approval ?
Working Drawings

* ONR
Health
Environment
Municipal
Others

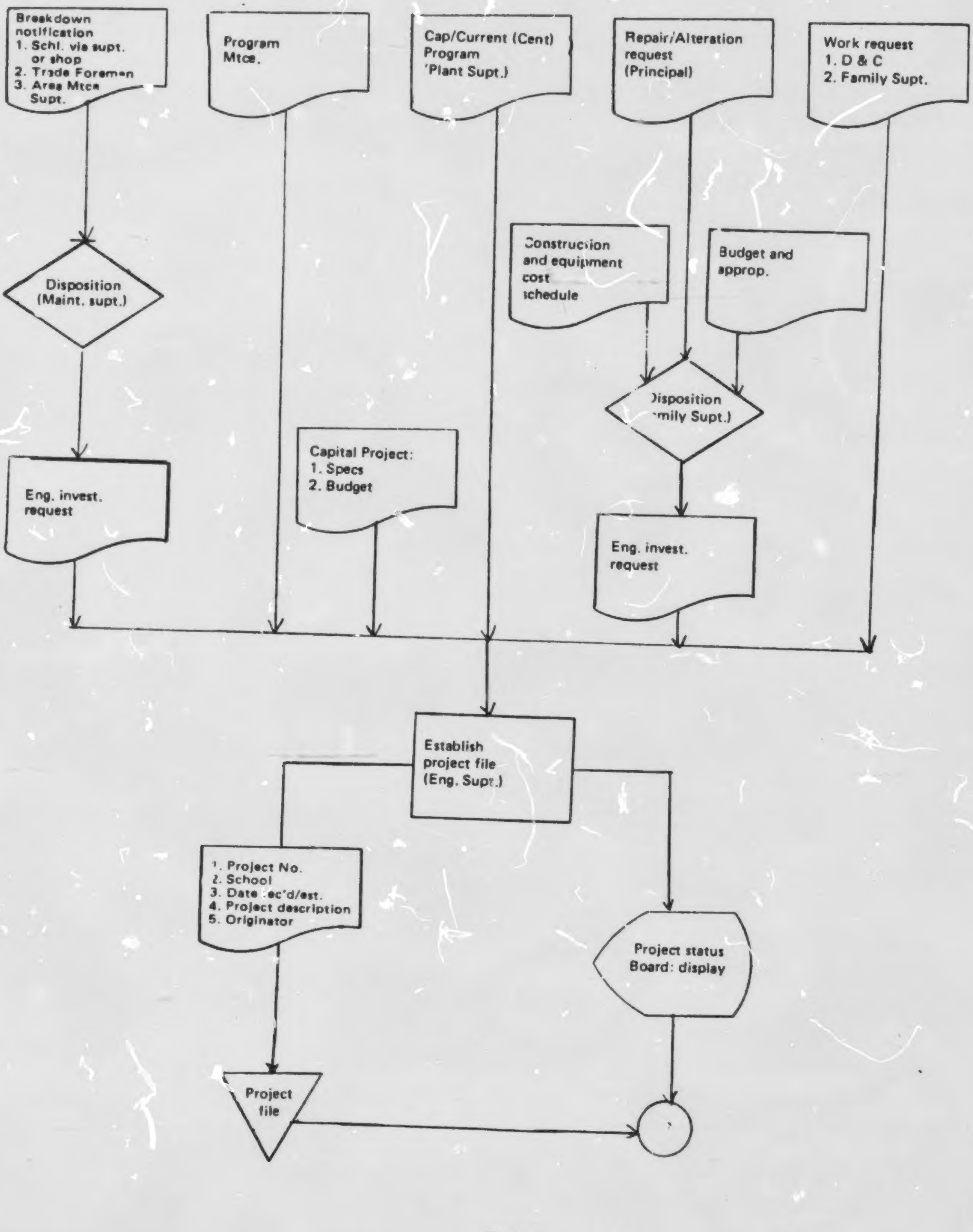
4.1.6 ACCOMMODATION SUPPLY: Capital Program – Design II (Working Drawings)


Approved sketch plans
Fire Marshall's revisions
Other agencies recommendations
Prepare working drawings and specifications
Other agencies
Approval
Recommendations
Approval of Fire Marshall
NO
YES
Required revisions
Current enrolments
Co-op needs study
Update needs justification
Board Presentation
Board approval ?
YES
Prepare Ministry submission
Ministry approval ?
YES
Final approval

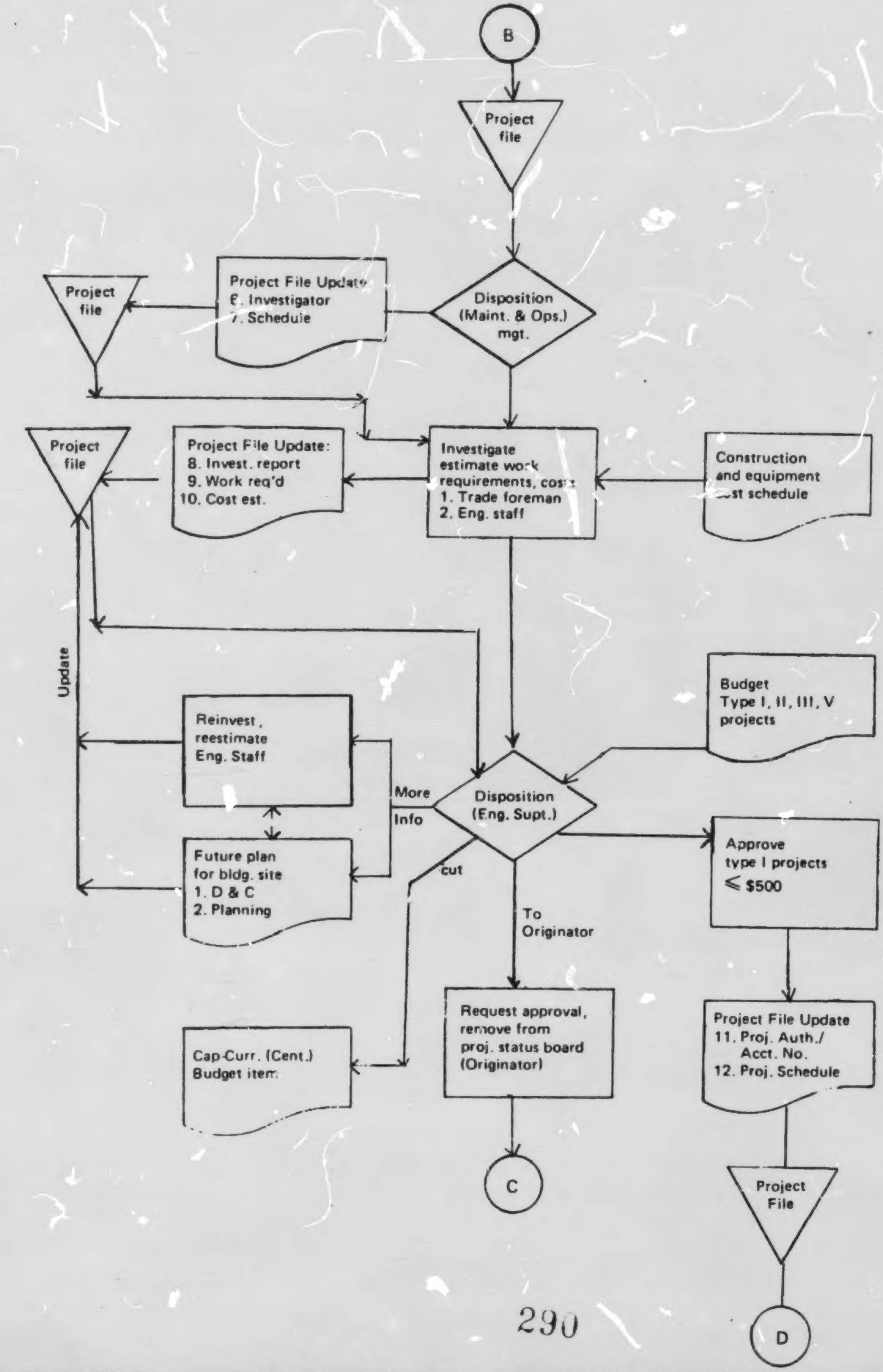
4.1.7 ACCOMMODATION SUPPLY: Capital Program – Final Project Approval


Working drawings
Construction specifications
Call tenders
Analyse bids, recommend contractor
Co-op needs study
Current enrolments
Update needs justification
NO
Board approval ?
YES
Notify architect: $ approved
Prepare Ministry Submission
Final Ministry project appvl.
F & E (from principal)
F & E $
Prepare OMB submission
Order F & E
OMB approval ?
Instalation
YES
Construction
Award contract

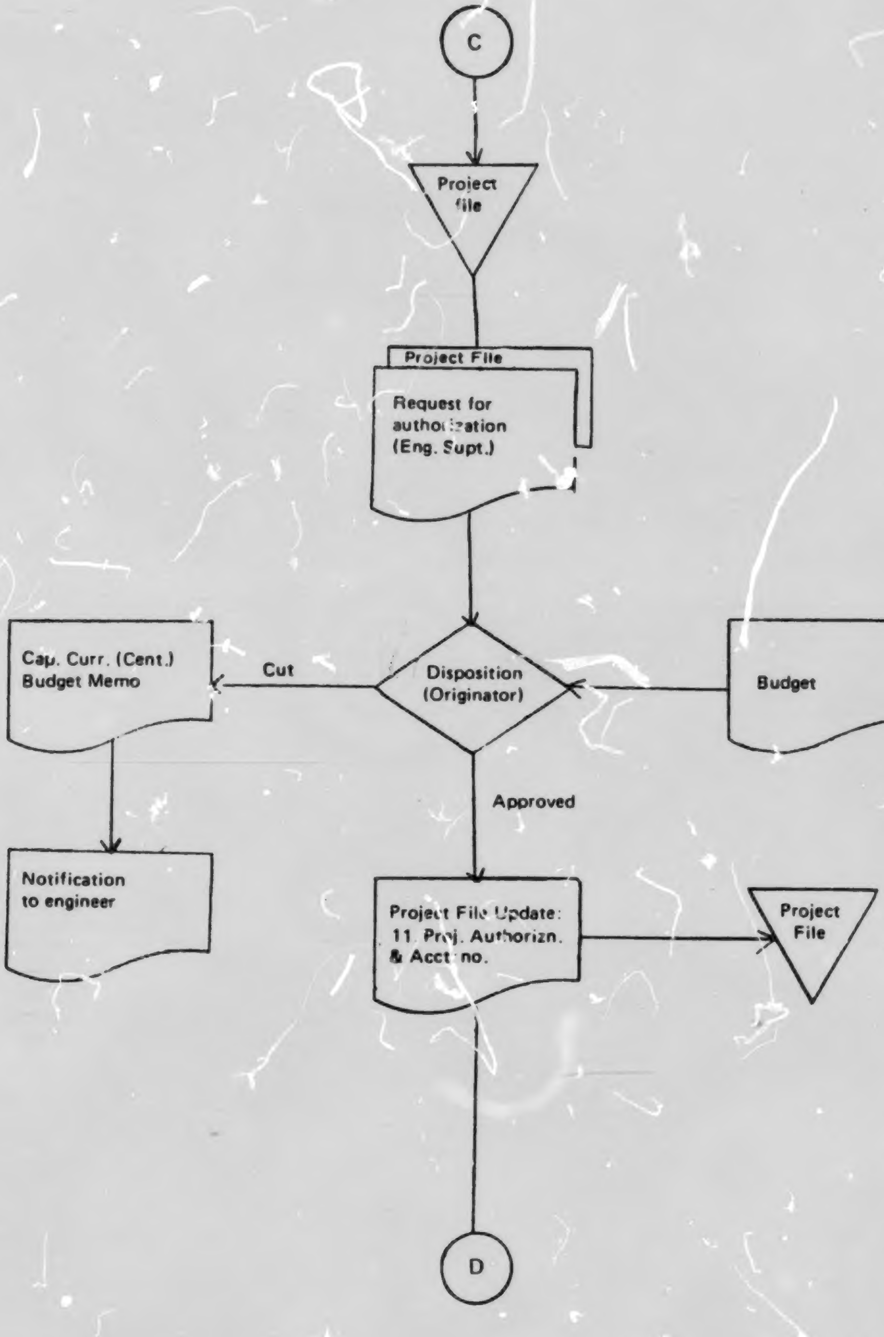
5.2.1 PLANT MAINTENANCE: Project Request


Breakdown notification
1. Schl. via supt. or shop
2. Trade Foremen
3. Area Mtce Supt.
Program Mtce.
Cap/Current (Cent) Program (Plant Supt.)
Repair/Alteration request (Principal)
Work request
1. D & C
2. Family Supt.
Disposition (Maint. supt.)
Construction and equipment cost schedule
Budget and approp.
Disposition (Family Supt.)
Eng. invest. request
Capital Project:
1. Specs
2. Budget
Eng. invest. request
Establish project file (Eng. Supt.)
1. Project No.
2. School
3. Date rec'd/est.
4. Project description
5. Originator
Project status Board: display
Project file

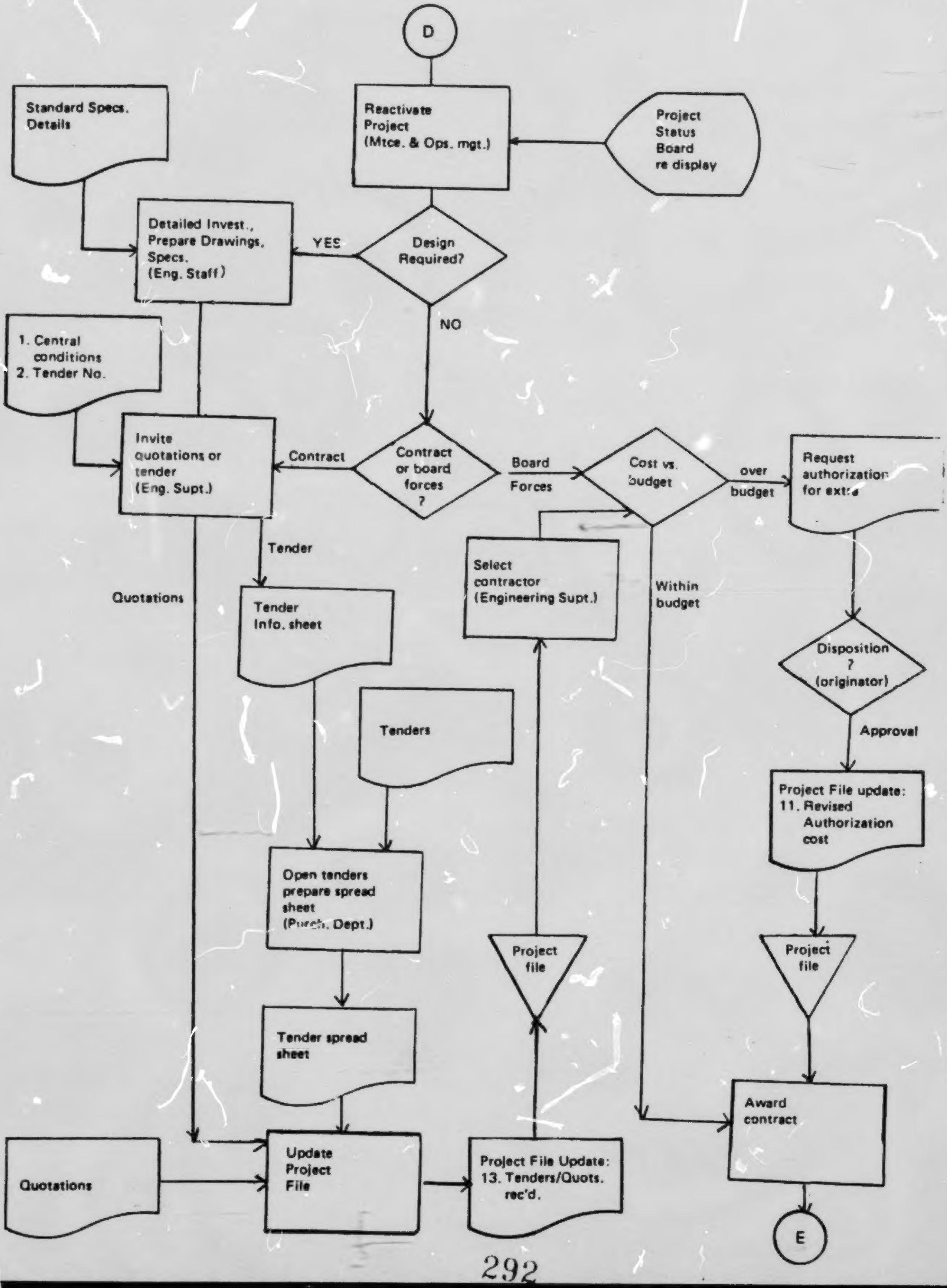
5.2.2 PLANT MAINTENANCE: Project Investigation


B
Project file
Project file
Project File Update
6. Investigator
7. Schedule
Disposition (Maint. & Ops.) mgt.
Project file
Project File Update:
8. Invest. report
9. Work req'd
10. Cost est.
Investigate estimate work requirements, costs
1. Trade foreman
2. Eng. staff
Construction and equipment cost schedule
Update
Budget Type I, II, III, V projects
Reinvest, reestimate Eng. Staff
More Info
Disposition (Eng. Supt.)
Future plan for bldg. site
1. D & C
2. Planning
cut
Approve type I projects ≤ $500
To Originator
Request approval, remove from proj. status board (Originator)
Cap-Curr. (Cent.) Budget item
Project File Update
11. Proj. Auth./ Acct. No.
12. Proj. Schedule
C
Project File
D

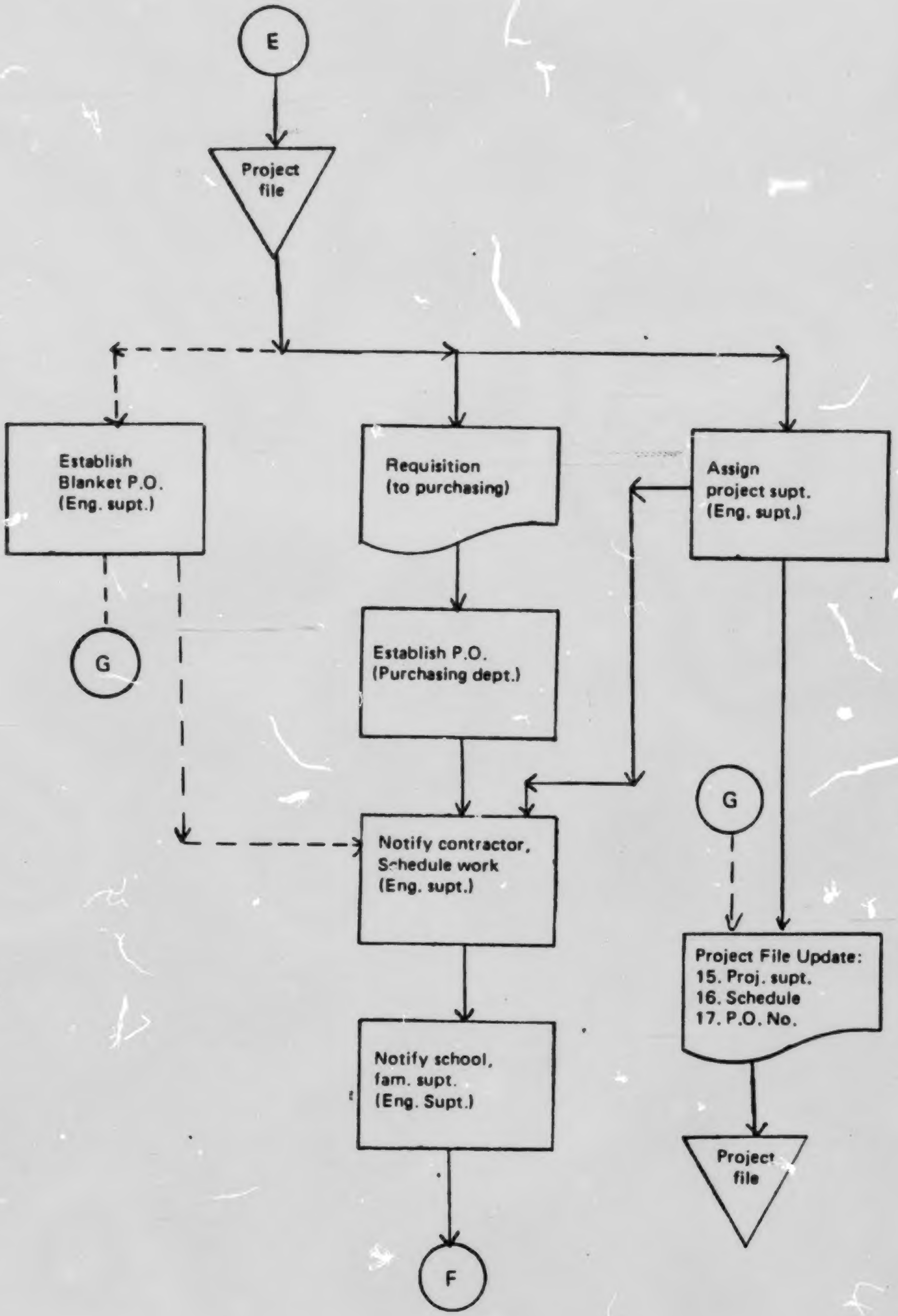
5.2.3 PLANT MAINTENANCE: Project Authorization


C
Project file
Project File
Request for authorization (Eng. Supt.)
Cap. Curr. (Cent.) Budget Memo
Cut
Disposition (Originator)
Budget
Approved
Notification to engineer
Project File Update: 11. Proj. Authorizn. & Acct. no.
Project File
D

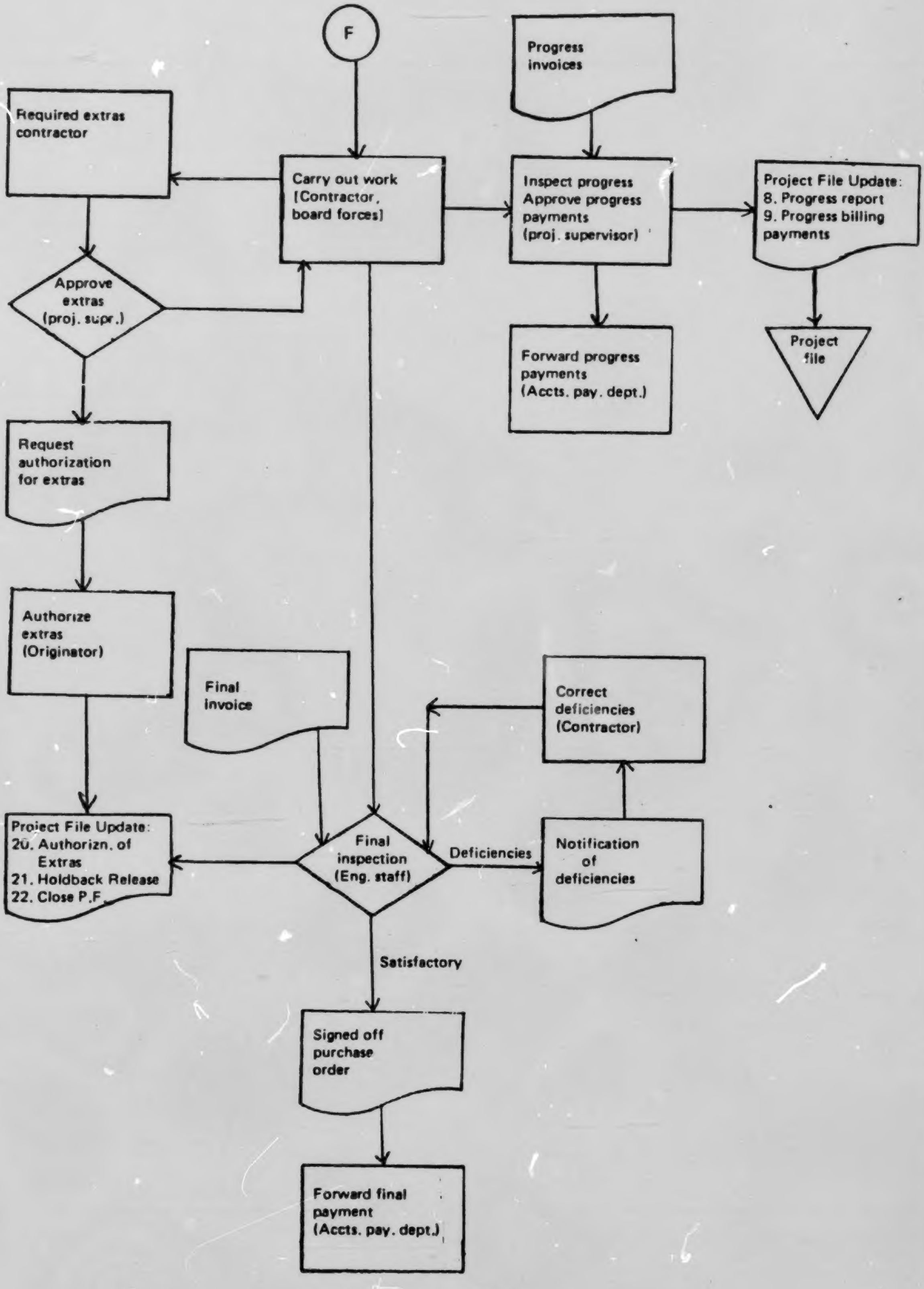
5.2.4 PLANT MAINTENANCE: Design, Contract


D
Standard Specs. Details
Reactivate Project (Mtce. & Ops. mgt.)
Project Status Board re display
Detailed Invest., Prepare Drawings, Specs. (Eng. Staff)
YES
Design Required?
NO
1. Central conditions
2. Tender No.
Invite quotations or tender (Eng. Supt.)
Contract
Contract or board forces ?
Board Forces
Cost vs. budget
over budget
Request authorization for extra
Tender
Quotations
Tender Info. sheet
Select contractor (Engineering Supt.)
Within budget
Disposition ? (originator)
Approval
Tenders
Project File update: 11. Revised Authorization cost
Open tenders prepare spread sheet (Purch. Dept.)
Project file
Project file
Tender spread sheet
Award contract
Quotations
Update Project File
Project File Update: 13. Tenders/Quots. rec'd.
E

5.2.5 PLANT MAINTENANCE: Project Schedule

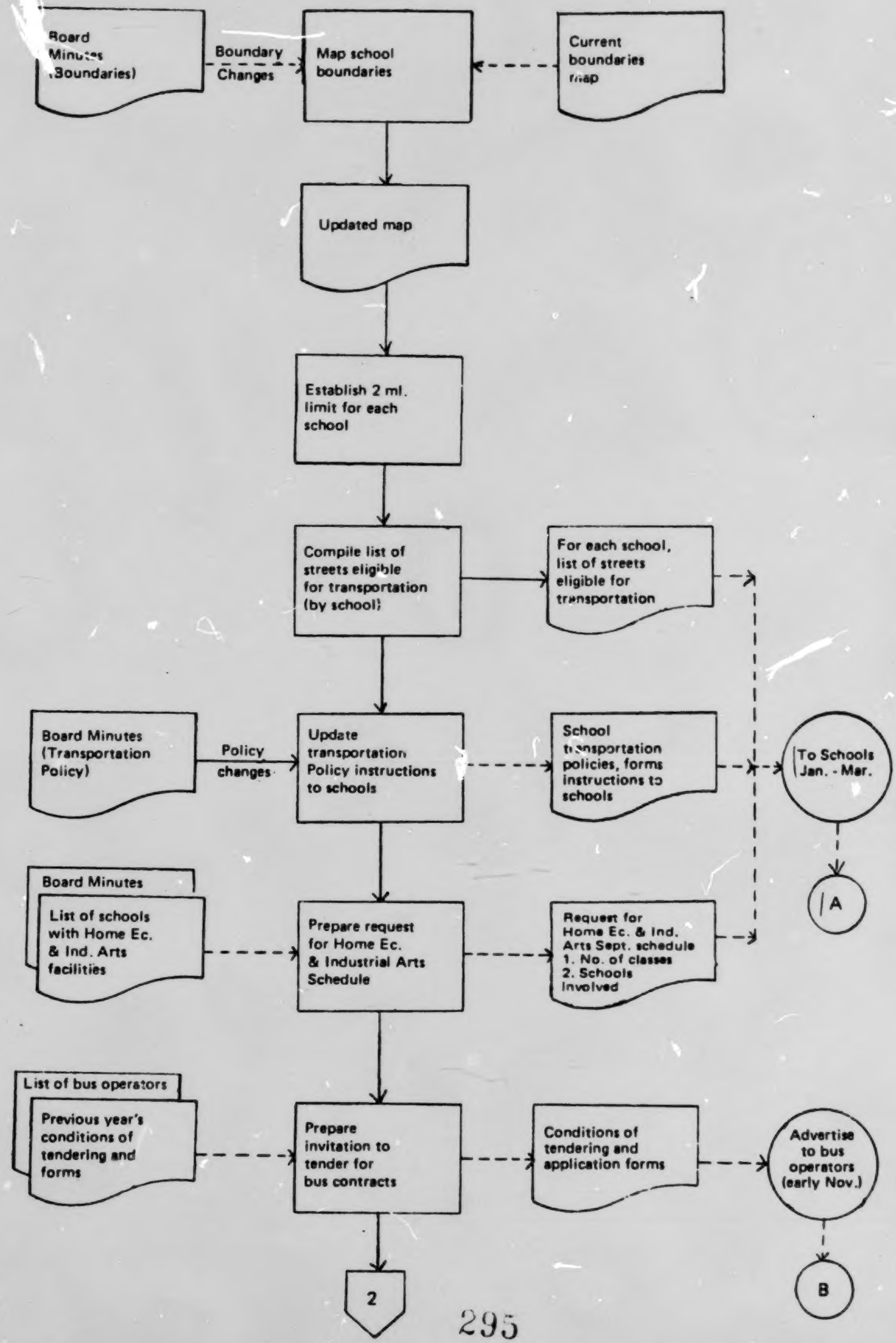

E
Project file
Establish Blanket P.O. (Eng. supt.)
Requisition (to purchasing)
Assign project supt. (Eng. supt.)
G
Establish P.O. (Purchasing dept.)
G
Notify contractor, Schedule work (Eng. supt.)
Project File Update:
15. Proj. supt.
16. Schedule
17. P.O. No.
Notify school, fam. supt. (Eng. Supt.)
Project file
F

5.2.6 PLANT MAINTENANCE: Carry Out Work


F
Progress invoices
Required extras contractor
Carry out work (Contractor, board forces)
Inspect progress Approve progress payments (proj. supervisor)
Project File Update: 8. Progress report 9. Progress billing payments
Approve extras (proj. supr.)
Forward progress payments (Accts. pay. dept.)
Project file
Request authorization for extras
Authorize extras (Originator)
Final invoice
Correct deficiencies (Contractor)
Project File Update: 20. Authorizn. of Extras 21. Holdback Release 22. Close P.F.
Final inspection (Eng. staff)
Deficiencies
Notification of deficiencies
Satisfactory
Signed off purchase order
Forward final payment (Accts. pay. dept.)

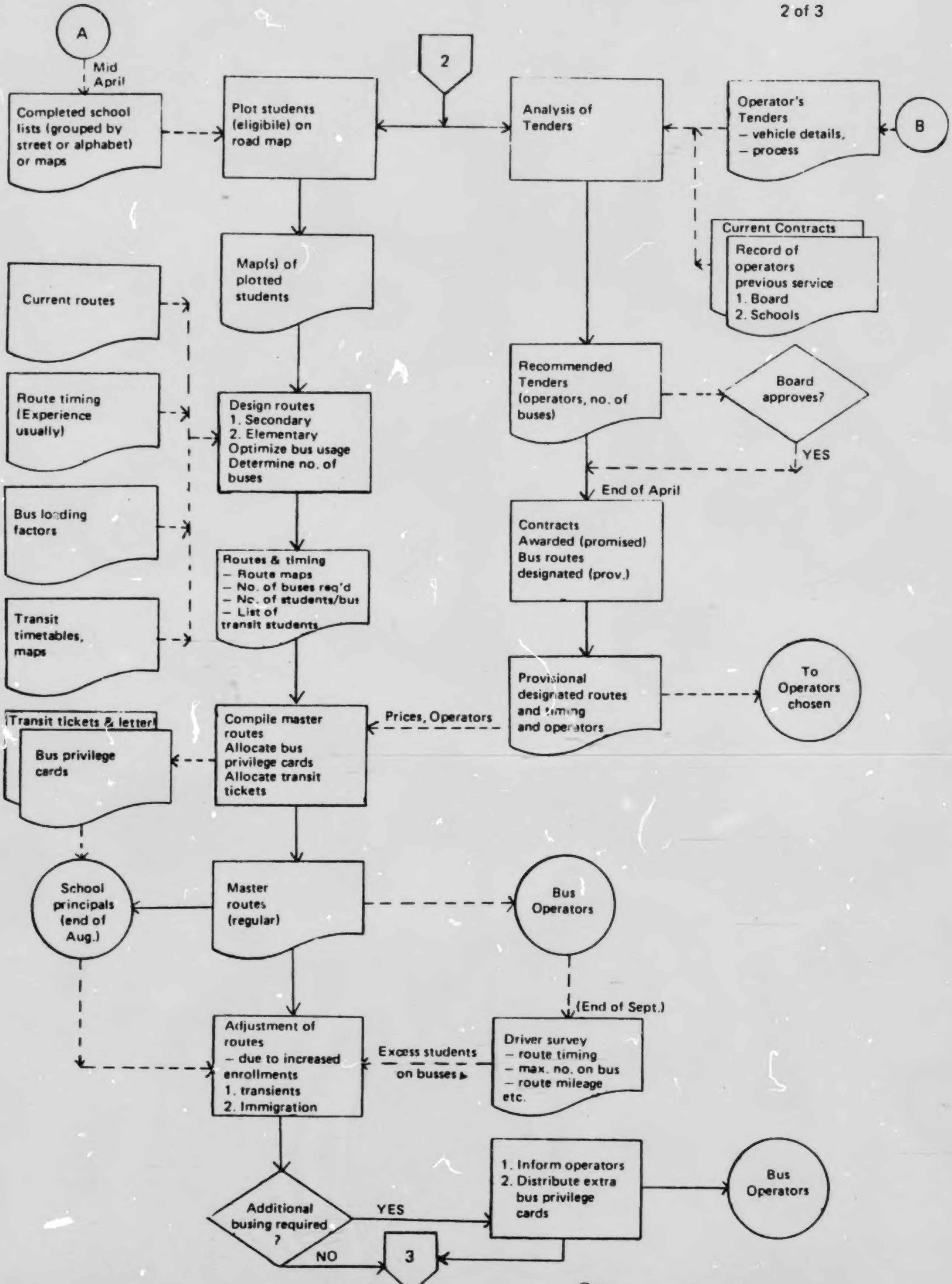
6.1.1, 6.1.2 & 6.1.3 TRANSPORTATION: Regular – Route Design and Contract Negotiations

1 of 3


Board Minutes (Boundaries)
Boundary Changes
Map school boundaries
Current boundaries map
Updated map
Establish 2 ml. limit for each school
Compile list of streets eligible for transportation (by school)
For each school, list of streets eligible for transportation
Board Minutes (Transportation Policy)
Policy changes
Update transportation Policy instructions to schools
School transportation policies, forms instructions to schools
To Schools Jan. - Mar.
A
Board Minutes
List of schools with Home Ec. & Ind. Arts facilities
Prepare request for Home Ec. & Industrial Arts Schedule
Request for Home Ec. & Ind. Arts Sept. schedule
1. No. of classes
2. Schools Involved
List of bus operators
Previous year's conditions of tendering and forms
Prepare invitation to tender for bus contracts
Conditions of tendering and application forms
Advertise to bus operators (early Nov.)
B
2

6.1.2 & 6.1.3 (cont'd)

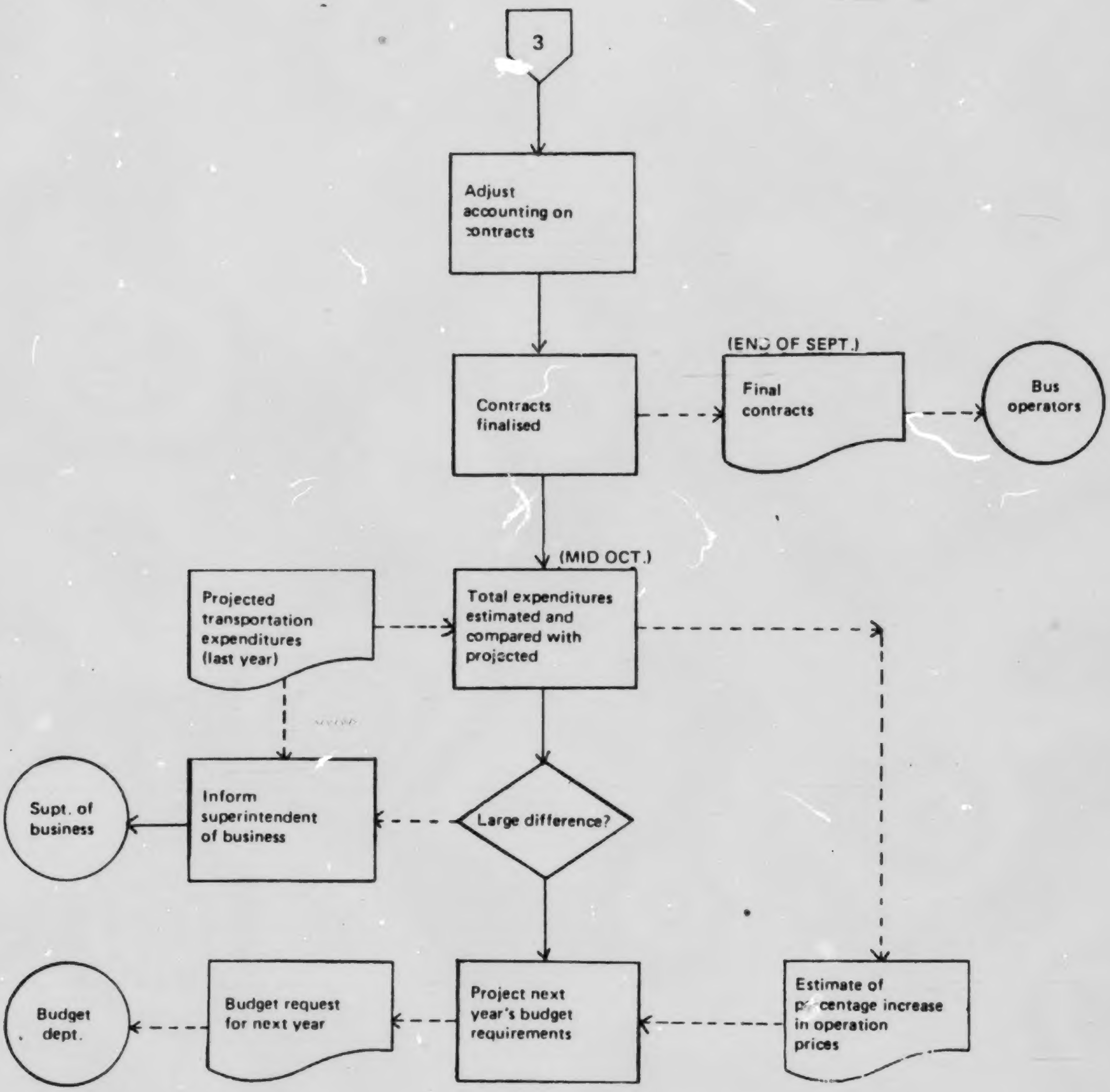
2 of 3



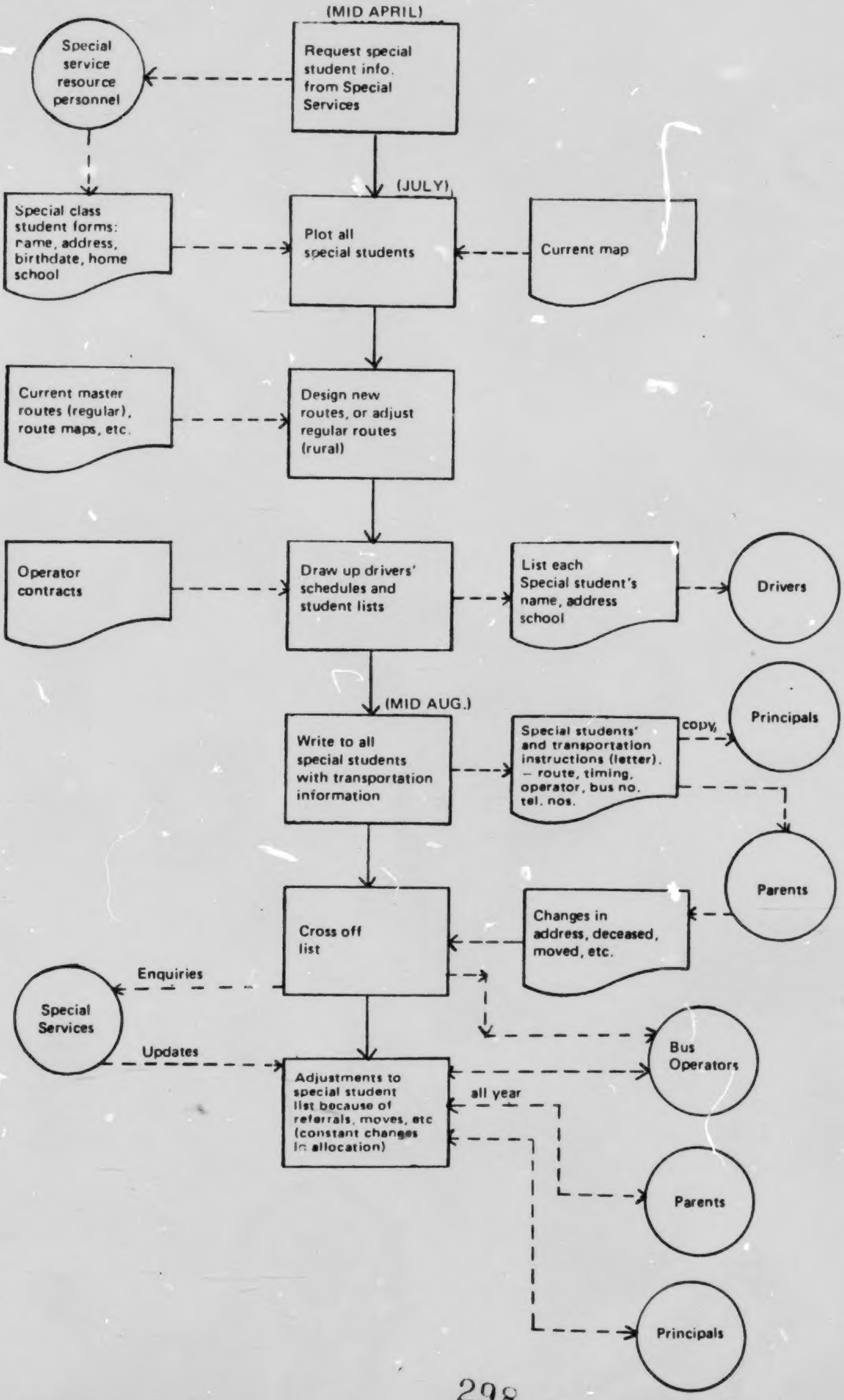
A
Mid April
Completed school lists (grouped by street or alphabet) or maps
Plot students (eligibile) on road map
2
Analysis of Tenders
Operator's Tenders – vehicle details, – process
B
Current Contracts
Record of operators previous service 1. Board 2. Schools
Map(s) of plotted students
Current routes
Route timing (Experience usually)
Bus loading factors
Transit timetables, maps
Design routes 1. Secondary 2. Elementary Optimize bus usage Determine no. of buses
Routes & timing – Route maps – No. of buses req'd – No. of students/bus – List of transit students
Recommended Tenders (operators, no. of buses)
Board approves?
YES
End of April
Contracts Awarded (promised) Bus routes designated (prov.)
Provisional designated routes and timing and operators
To Operators chosen
Prices, Operators
Transit tickets & letter
Bus privilege cards
Compile master routes Allocate bus privilege cards Allocate transit tickets
School principals (end of Aug.)
Master routes (regular)
Bus Operators
(End of Sept.)
Driver survey – route timing – max. no. on bus – route mileage etc.
Excess students on busses
Adjustment of routes – due to increased enrollments 1. transients 2. Immigration
Additional busing required ?
YES
NO
1. Inform operators 2. Distribute extra bus privilege cards
Bus Operators
3

6.1.3 6.1.2, 6.1.3 & 6.1.4 (cont'd)

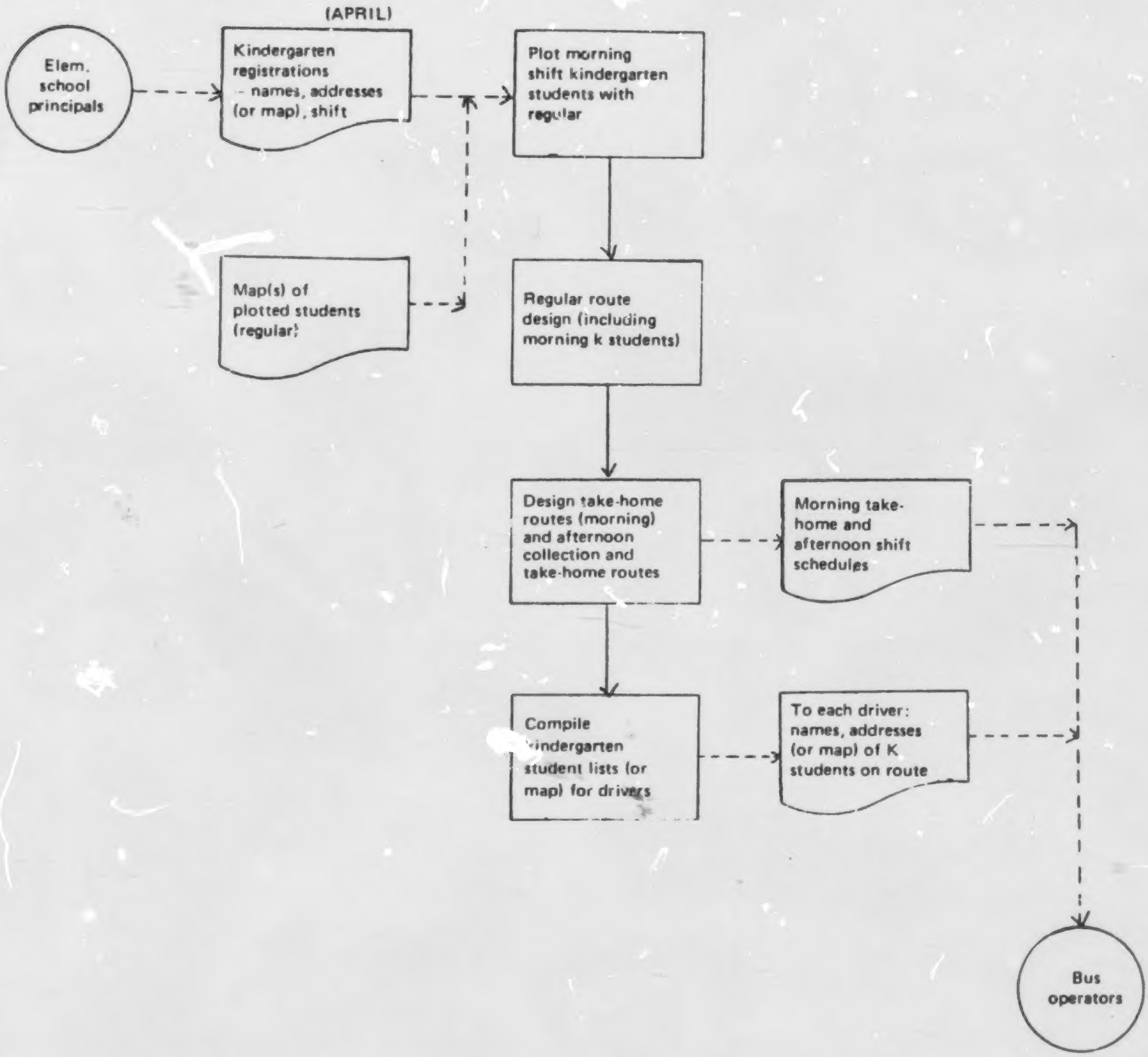
3 of 3


3
Adjust accounting on contracts
Contracts finalised
(END OF SEPT.)
Final contracts
Bus operators
(MID OCT.)
Projected transportation expenditures (last year)
Total expenditures estimated and compared with projected
Supt. of business
Inform superintendent of business
Large difference?
Budget dept.
Budget request for next year
Project next year's budget requirements
Estimate of percentage increase in operation prices

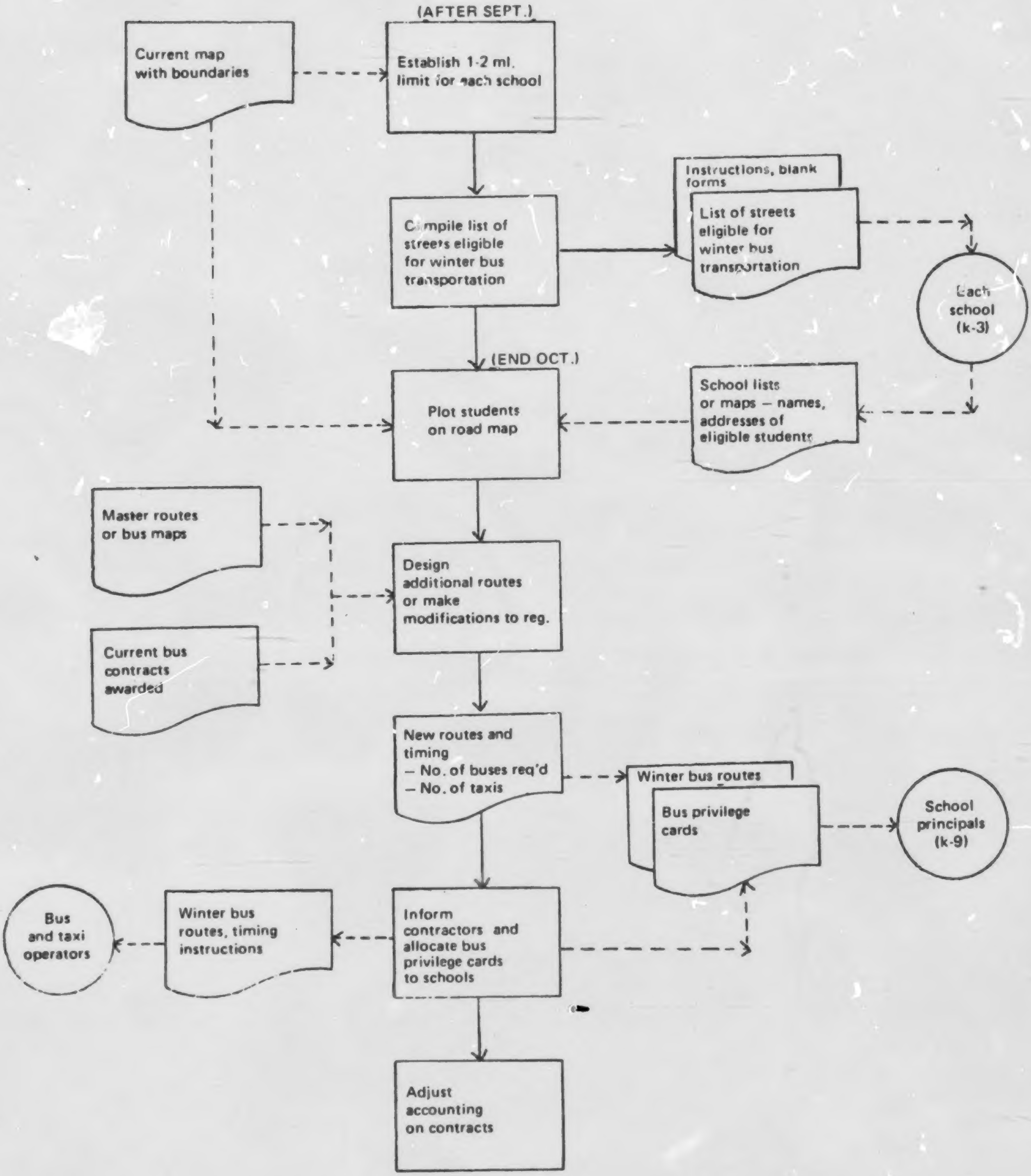
6.2 TRANSPORTATION: Special Students


(MID APRIL)
Request special student info. from Special Services
Special service resource personnel
(JULY)
Special class student forms: name, address, birthdate, home school
Plot all special students
Current map
Current master routes (regular), route maps, etc.
Design new routes, or adjust regular routes (rural)
Operator contracts
Draw up drivers' schedules and student lists
List each Special student's name, address school
Drivers
(MID AUG.)
Write to all special students with transportation information
Special students' and transportation instructions (letter). – route, timing, operator, bus no. tel. nos.
copy,
Principals
Parents
Cross off list
Changes in address, deceased, moved, etc.
Enquiries
Special Services
Updates
Adjustments to special student list because of referrals, moves, etc (constant changes in allocation)
all year
Bus Operators
Parents
Principals

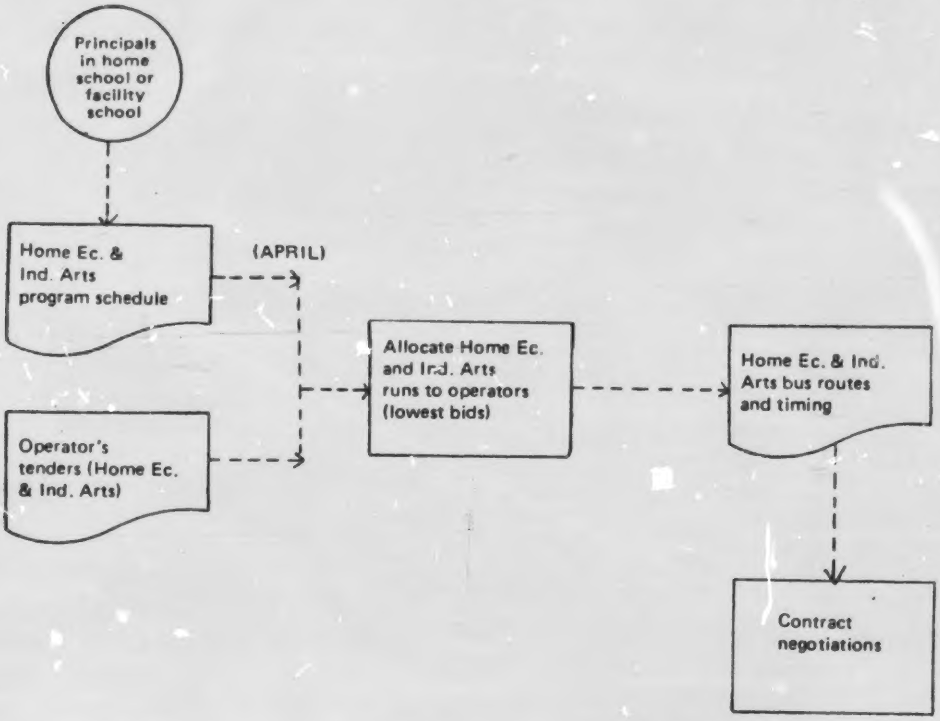
6.3 TRANSPORTATION: Kindergarten Busing


(APRIL)
Elem. school principals
Kindergarten registrations -- names, addresses (or map), shift
Plot morning shift kindergarten students with regular
Map(s) of plotted students (regular)
Regular route design (including morning k students)
Design take-home routes (morning) and afternoon collection and take-home routes
Morning take-home and afternoon shift schedules
Compile kindergarten student lists (or map) for drivers
To each driver: names, addresses (or map) of K students on route
Bus operators

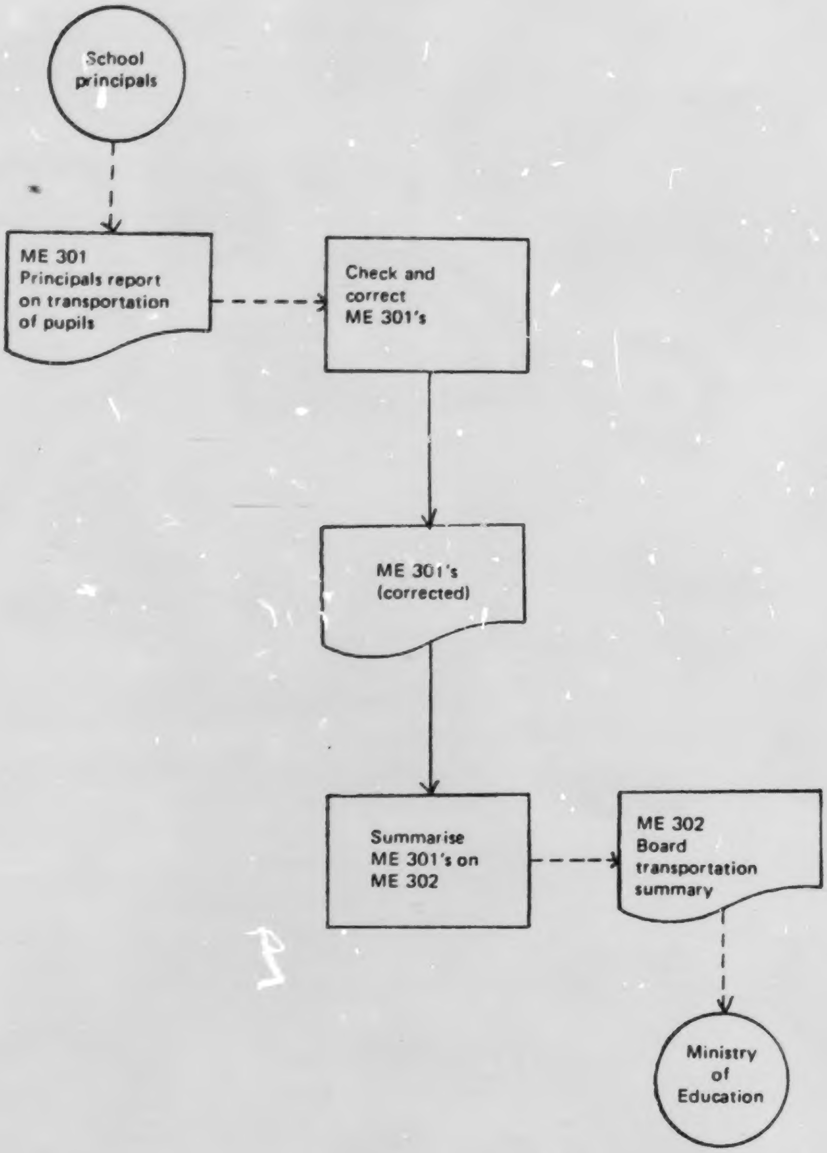
6.4 TRANSPORTATION: Winter Bus Scheduling


(AFTER SEPT.)
Current map with boundaries
Establish 1-2 mi. limit for each school
Compile list of streets eligible for winter bus transportation
Instructions, blank forms
List of streets eligible for winter bus transportation
Each school (k-3)
(END OCT.)
Plot students on road map
School lists or maps – names, addresses of eligible students
Master routes or bus maps
Current bus contracts awarded
Design additional routes or make modifications to reg.
New routes and timing
– No. of buses req'd
– No. of taxis
Winter bus routes
Bus privilege cards
School principals (k-9)
Bus and taxi operators
Winter bus routes, timing instructions
Inform contractors and allocate bus privilege cards to schools
Adjust accounting on contracts

6.5 TRANSPORTATION: Home Economics and Industrial Arts

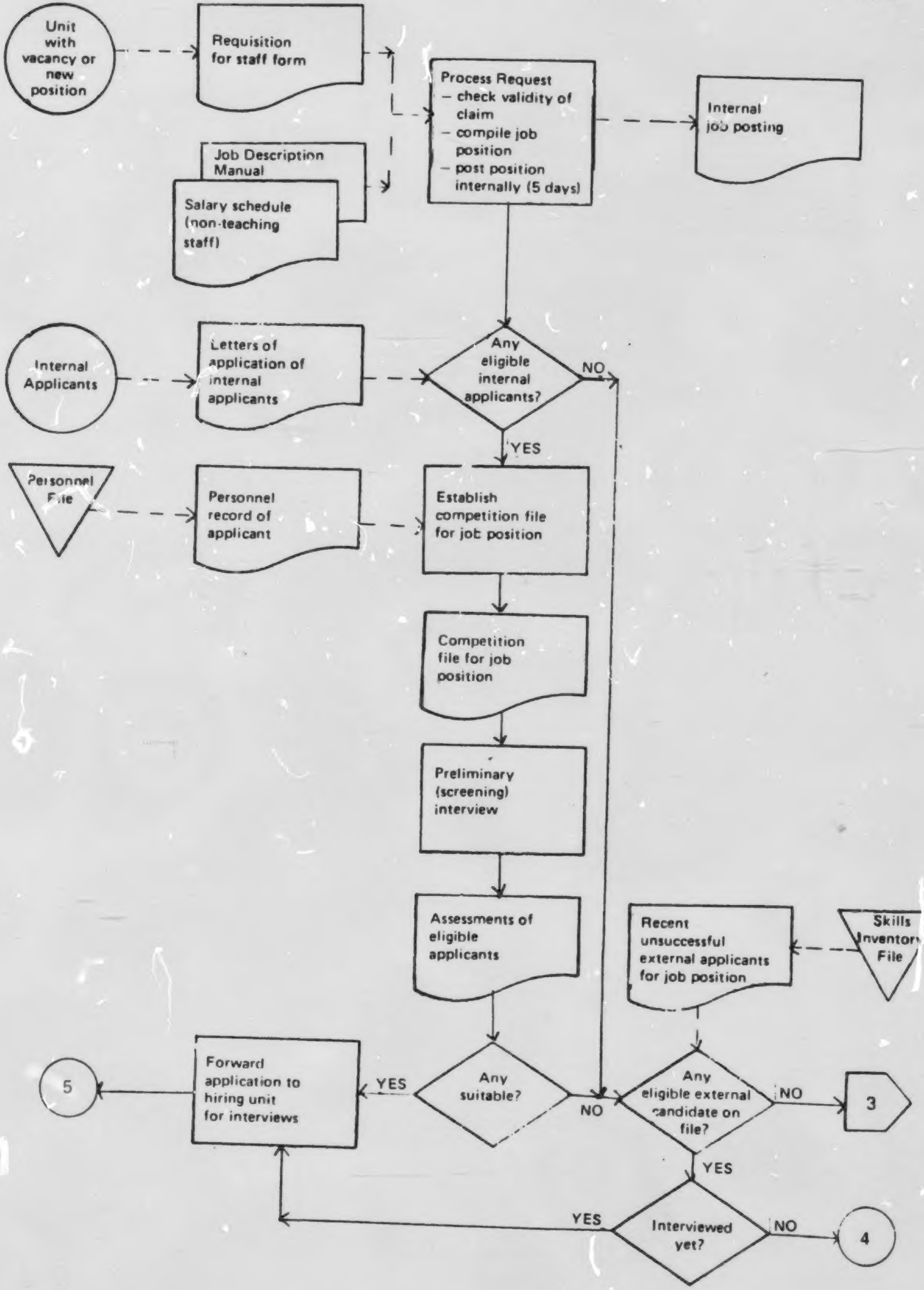

Principals in home school or facility school
Home Ec. & Ind. Arts program schedule
(APRIL)
Operator's tenders (Home Ec. & Ind. Arts)
Allocate Home Ec. and Ind. Arts runs to operators (lowest bids)
Home Ec. & Ind. Arts bus routes and timing
Contract negotiations

6.6 TRANSPORTATION: Ministry Reports


School principals
ME 301 Principals report on transportation of pupils
Check and correct ME 301's
ME 301's (corrected)
Summarise ME 301's on ME 302
ME 302 Board transportation summary
Ministry of Education

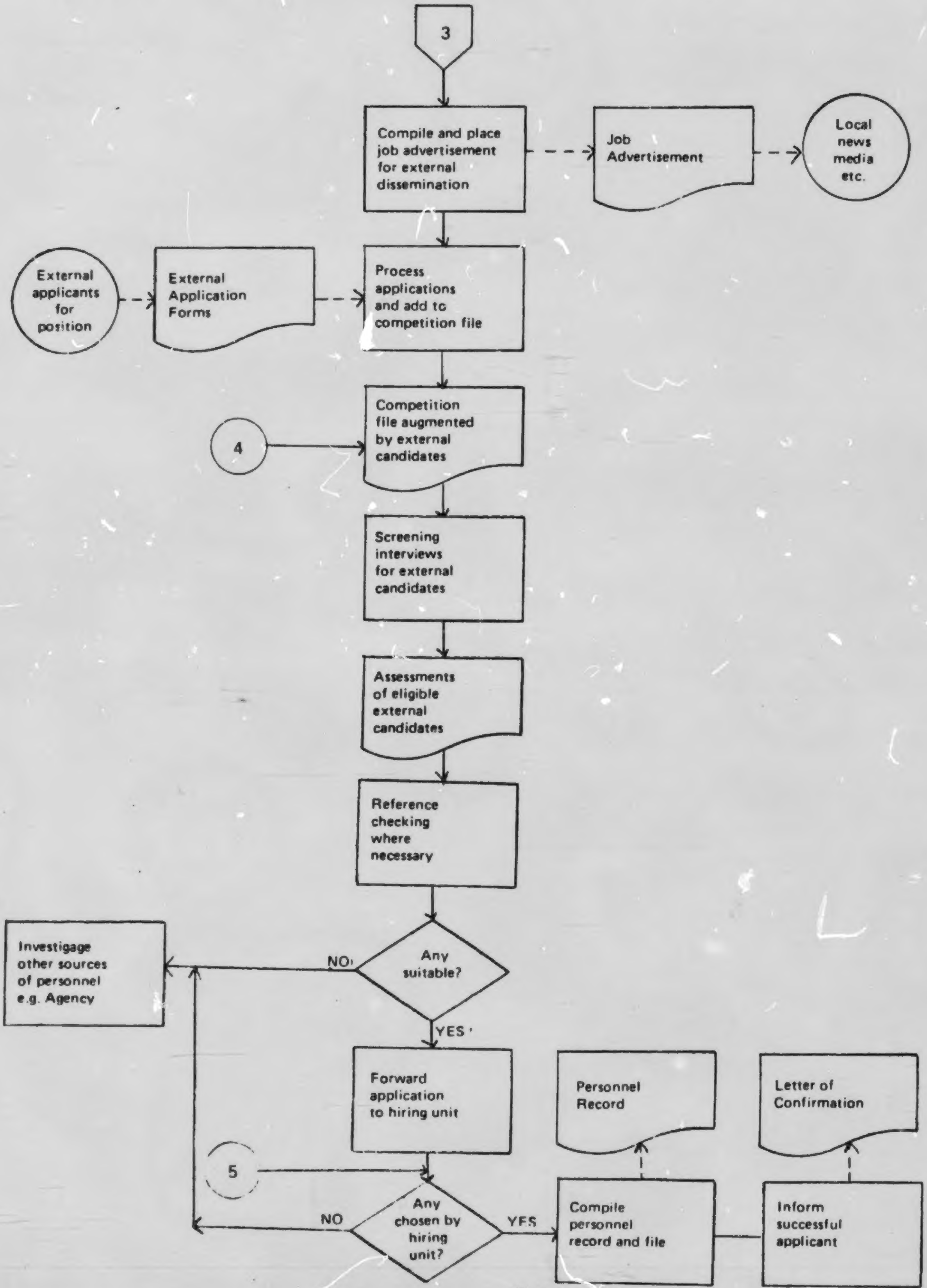
7.1.1 PERSONNEL ADMINISTRATION: Non-Teaching Staff Recruitment

1 of 2

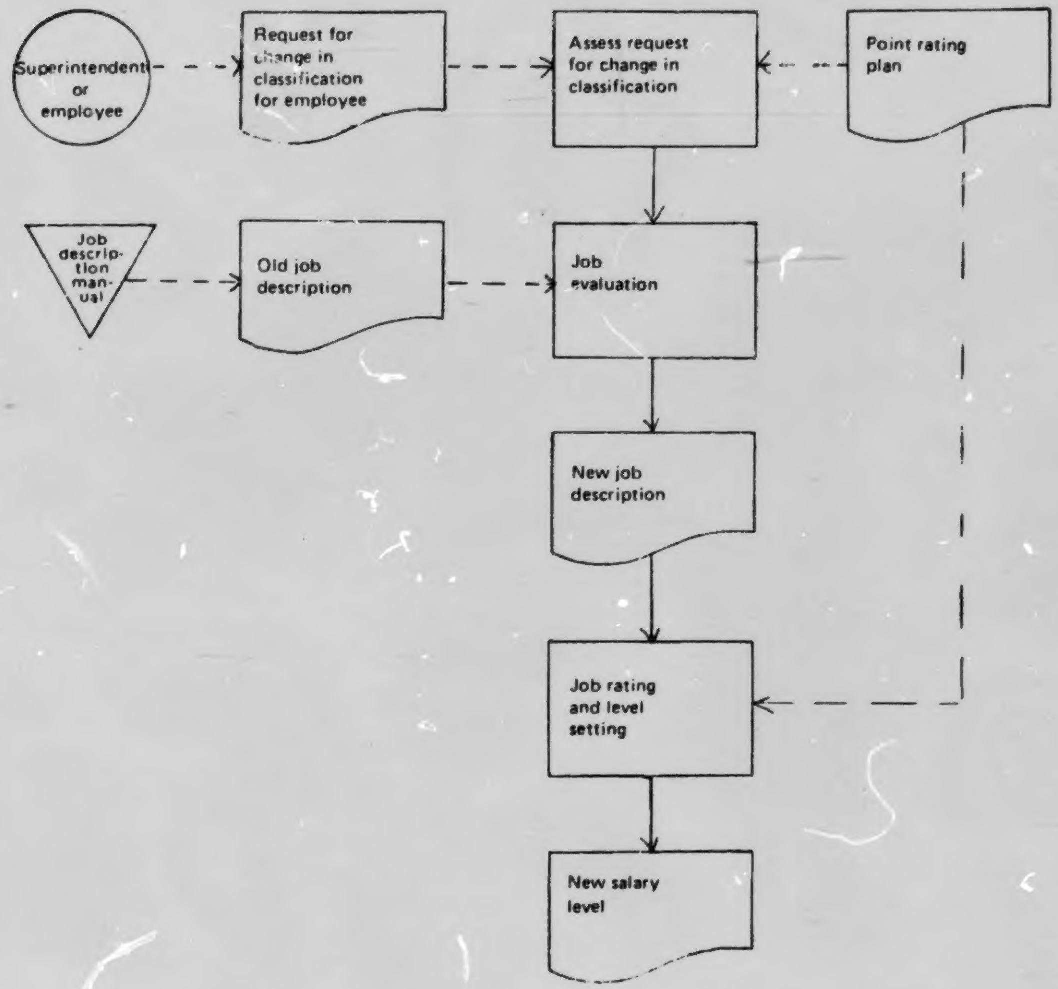

Unit with vacancy or new position
Requisition for staff form
Job Description Manual
Salary schedule (non-teaching staff)
Process Request
– check validity of claim
– compile job position
– post position internally (5 days)
Internal job posting
Internal Applicants
Letters of application of internal applicants
Any eligible internal applicants?
NO
YES
Personnel File
Personnel record of applicant
Establish competition file for job position
Competition file for job position
Preliminary (screening) interview
Assessments of eligible applicants
Recent unsuccessful external applicants for job position
Skills Inventory File
Any suitable?
YES
NO
Forward application to hiring unit for interviews
5
Any eligible external candidate on file?
NO
3
YES
Interviewed yet?
YES
NO
4

7.1.1 (cont'd)

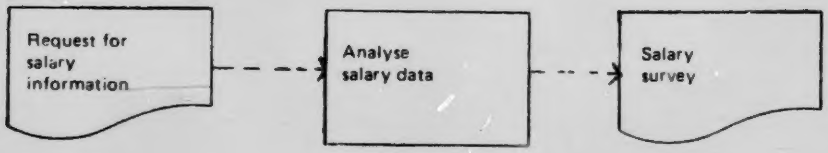
2 of 2


3
Compile and place job advertisement for external dissemination
Job Advertisement
Local news media etc.
External applicants for position
External Application Forms
Process applications and add to competition file
4
Competition file augmented by external candidates
Screening interviews for external candidates
Assessments of eligible external candidates
Reference checking where necessary
Any suitable?
NO
YES
Investigage other sources of personnel e.g. Agency
Forward application to hiring unit
5
Any chosen by hiring unit?
NO
YES
Personnel Record
Letter of Confirmation
Compile personnel record and file
Inform successful applicant

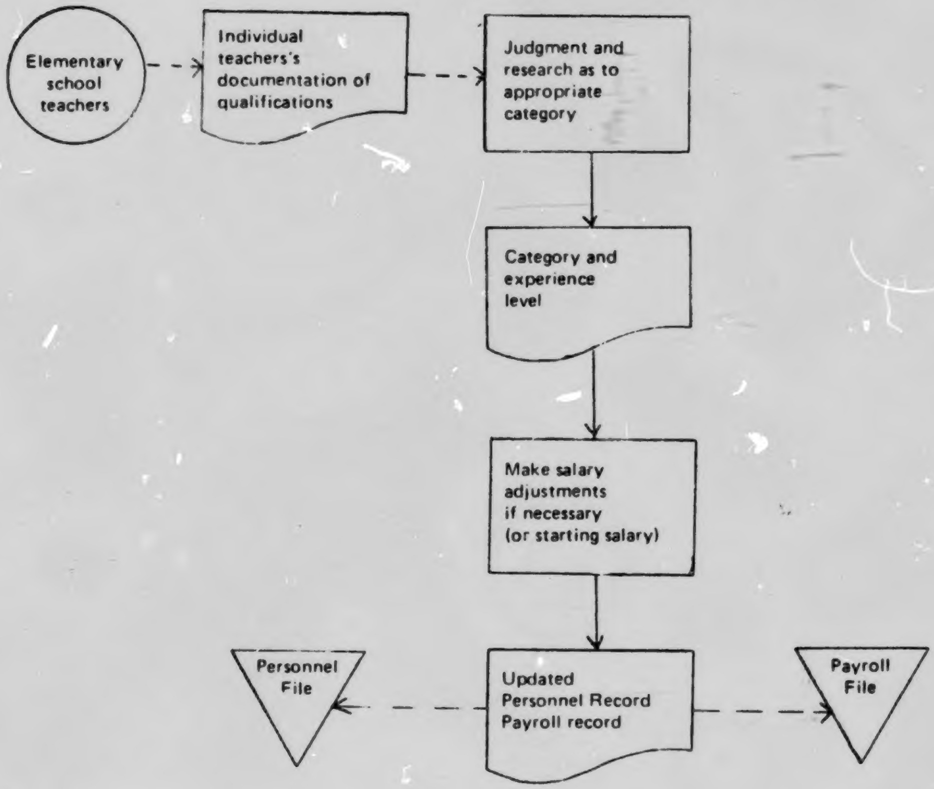
7.1.2.1 PERSONNEL ADMINISTRATION: Salary Administration – Job Evaluation


Superintendent or employee
Request for change in classification for employee
Assess request for change in classification
Point rating plan
Job description manual
Old job description
Job evaluation
New job description
Job rating and level setting
New salary level

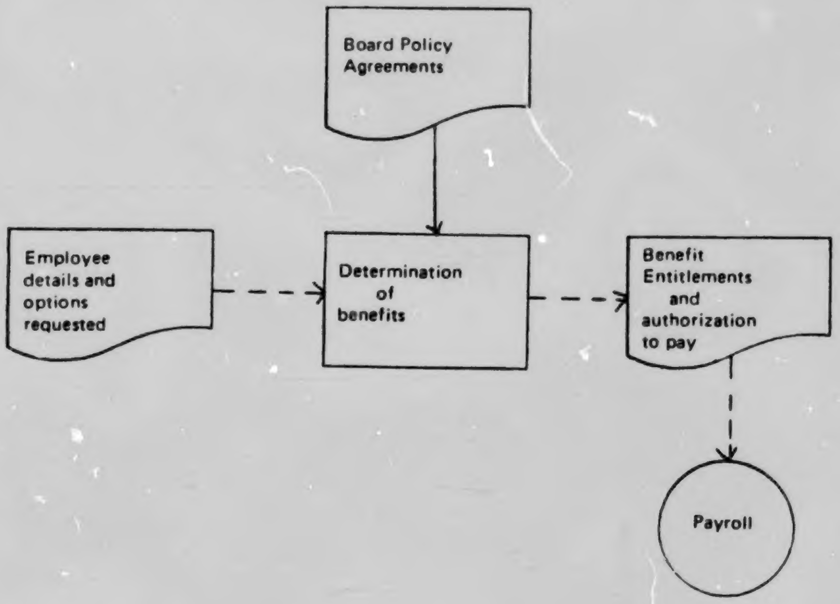
7.1.2.2 PERSONNEL ADMINISTRATION: Salary Administration – Salary Surveys


Request for salary information
Analyse salary data
Salary survey

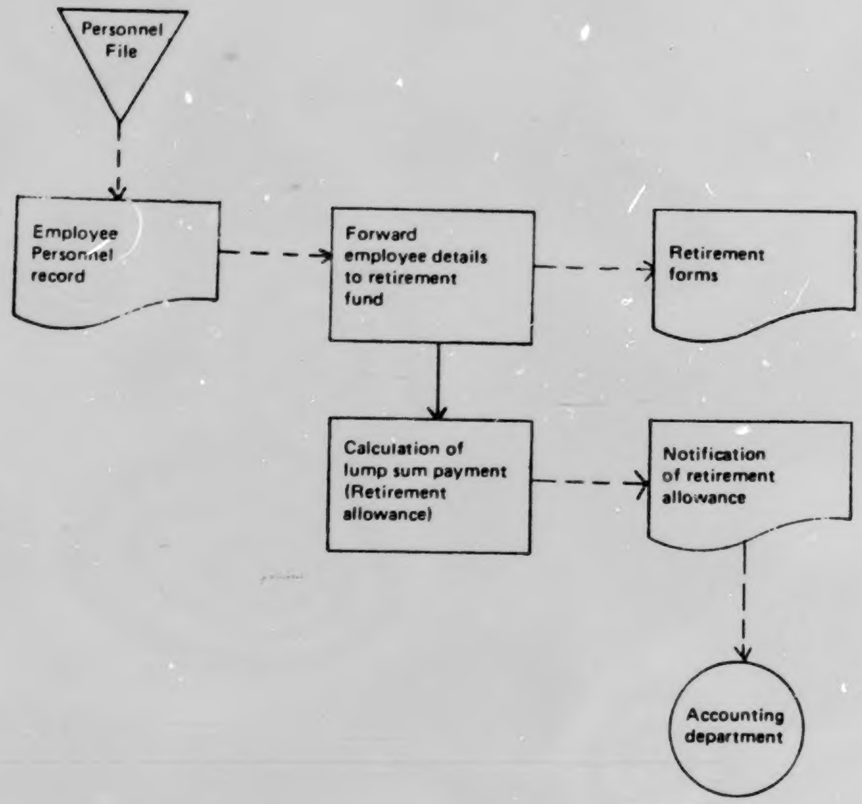
7.1.2.3 PERSONNEL ADMINISTRATION: Salary Administration – Interpretation of Salary Schedules


Elementary school teachers
Individual teachers's documentation of qualifications
Judgment and research as to appropriate category
Category and experience level
Make salary adjustments if necessary (or starting salary)
Personnel File
Updated Personnel Record Payroll record
Payroll File

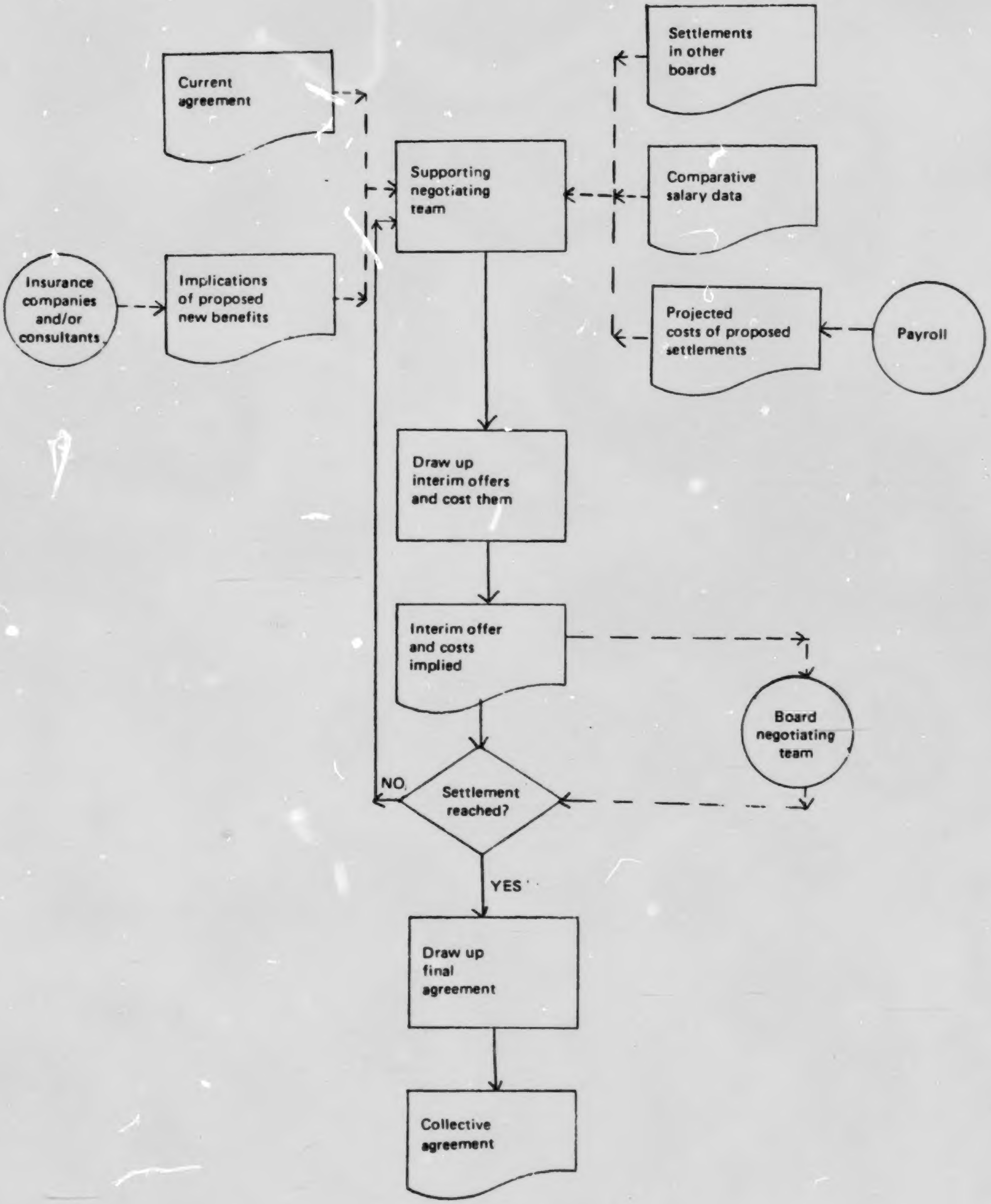
7.1.3.1 PERSONNEL DEPARTMENT: Employee Benefits – New Employees


Board Policy Agreements
Employee details and options requested
Determination of benefits
Benefit Entitlements and authorization to pay
Payroll

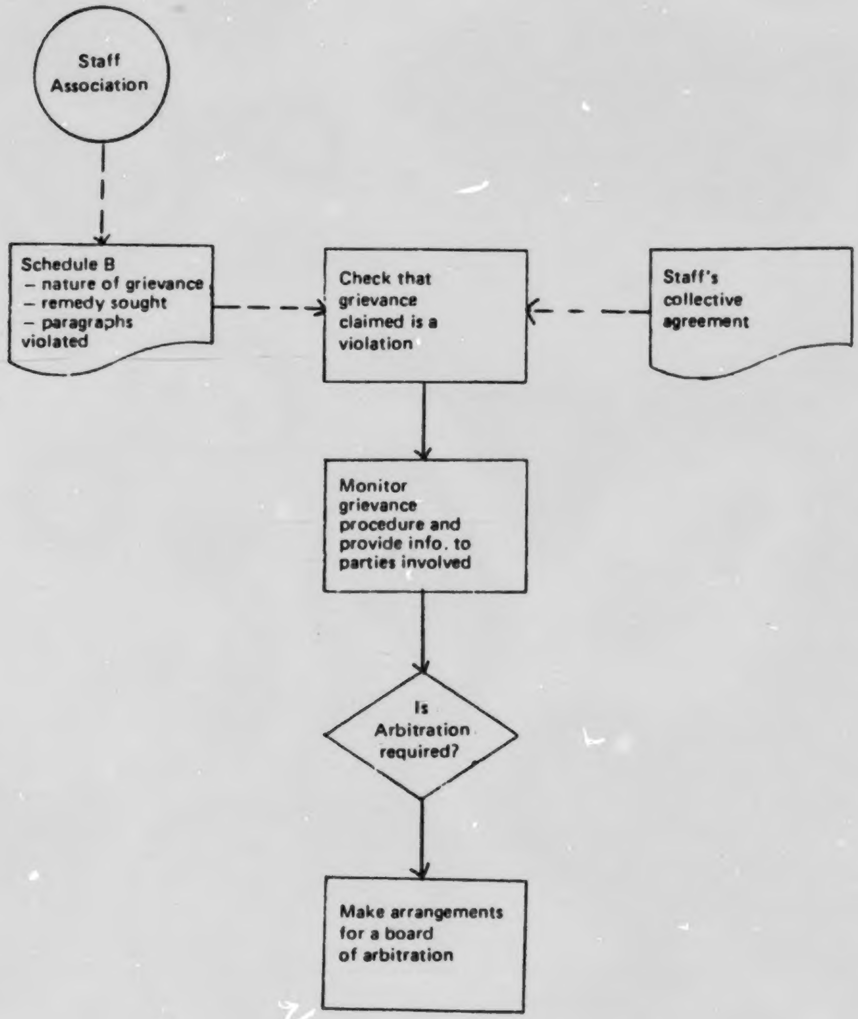
7.1.3.3 PERSONNEL ADMINISTRATION: Employee Benefits – Terminating/Retiring Employee


Personnel File
Employee Personnel record
Forward employee details to retirement fund
Retirement forms
Calculation of lump sum payment (Retirement allowance)
Notification of retirement allowance
Accounting department

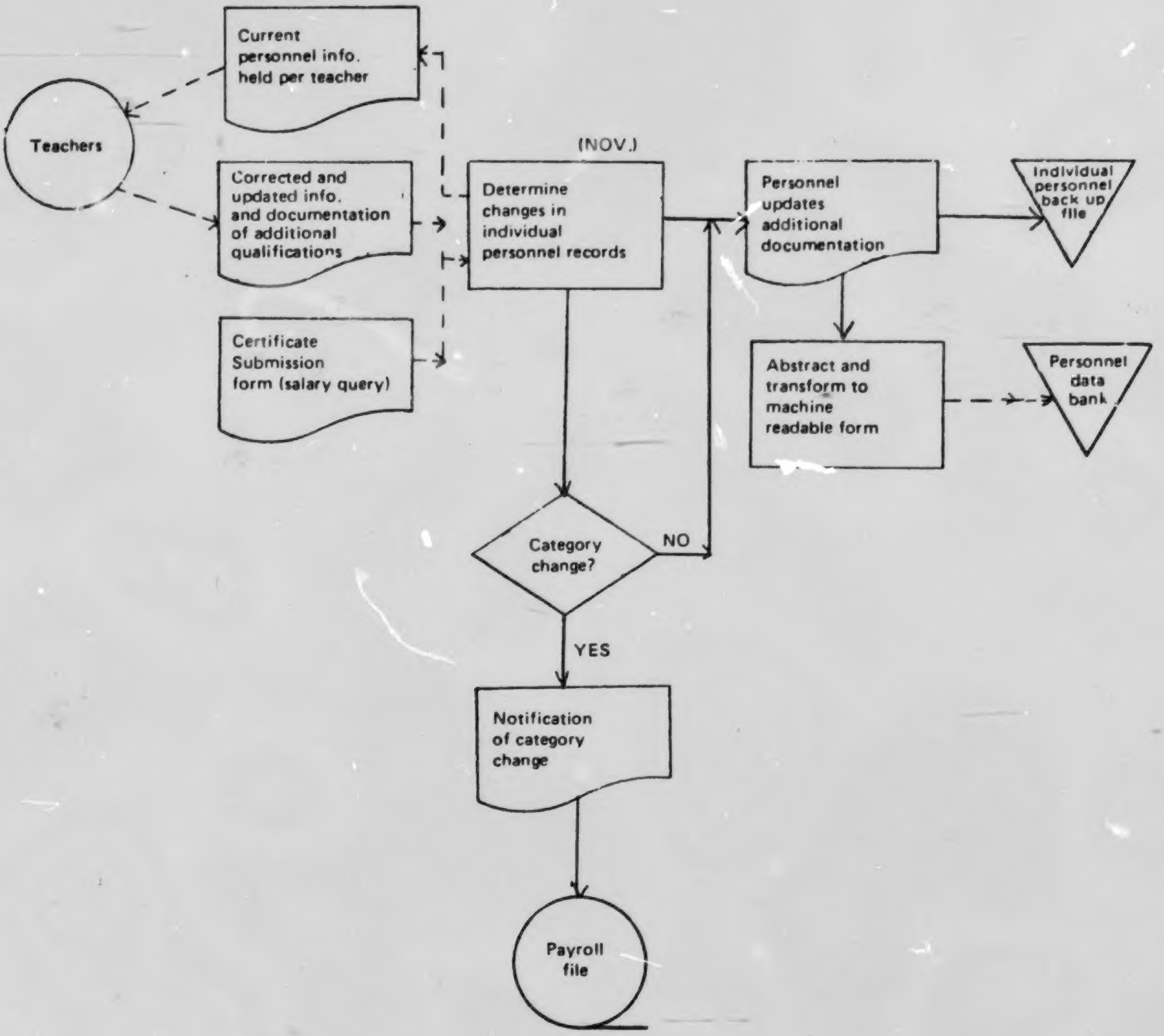
7.1.4 PERSONNEL ADMINISTRATION: Negotiations


Settlements in other boards
Current agreement
Supporting negotiating team
Comparative salary data
Insurance companies and/or consultants
Implications of proposed new benefits
Projected costs of proposed settlements
Payroll
Draw up interim offers and cost them
Interim offer and costs implied
Board negotiating team
NO
Settlement reached?
YES
Draw up final agreement
Collective agreement

7.1.5 PERSONNEL ADMINISTRATION: Collective Agreement Violations

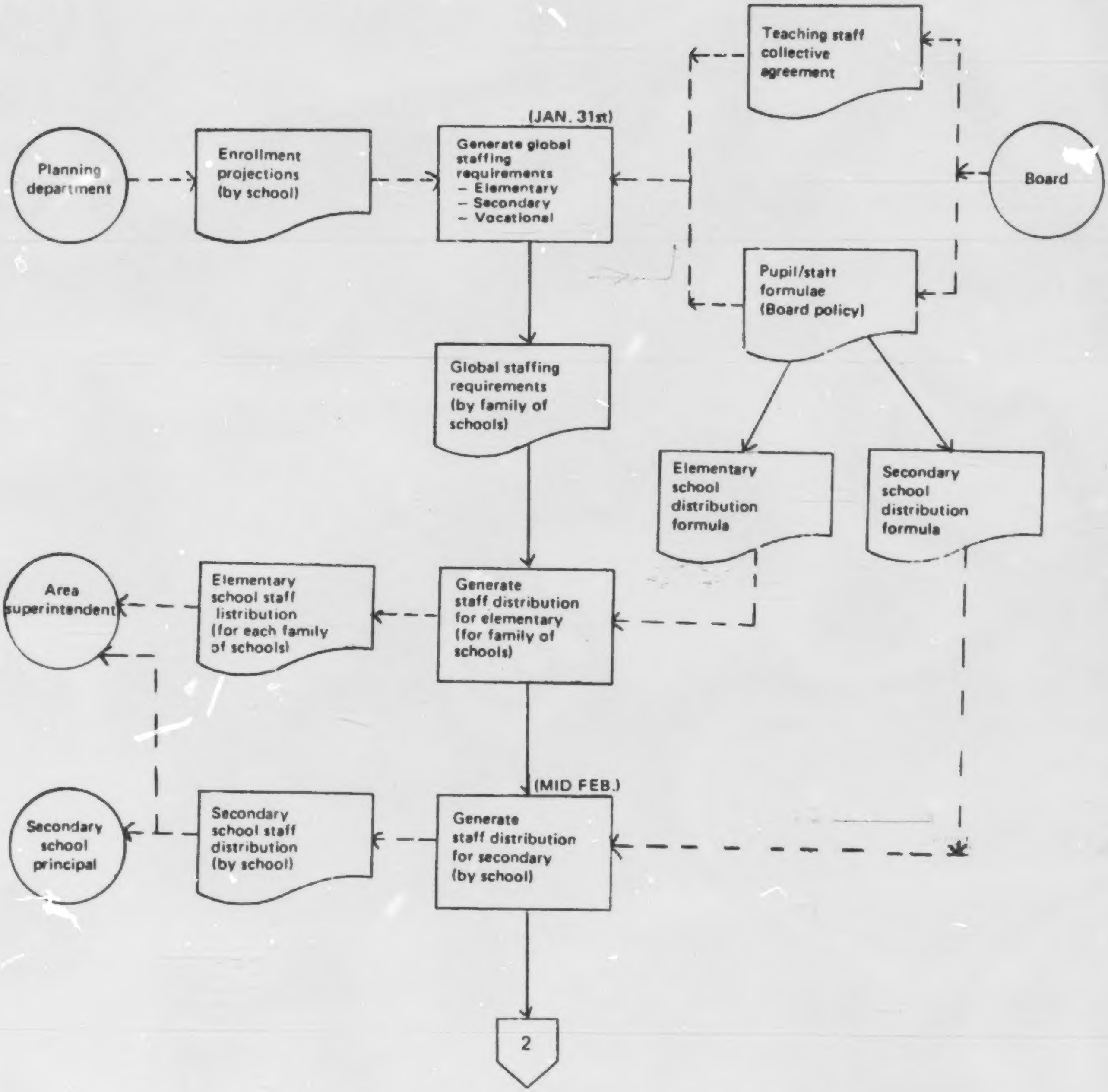

Staff Association
Schedule B
– nature of grievance
– remedy sought
– paragraphs violated
Check that grievance claimed is a violation
Staff's collective agreement
Monitor grievance procedure and provide info. to parties involved
Is Arbitration required?
Make arrangements for a board of arbitration

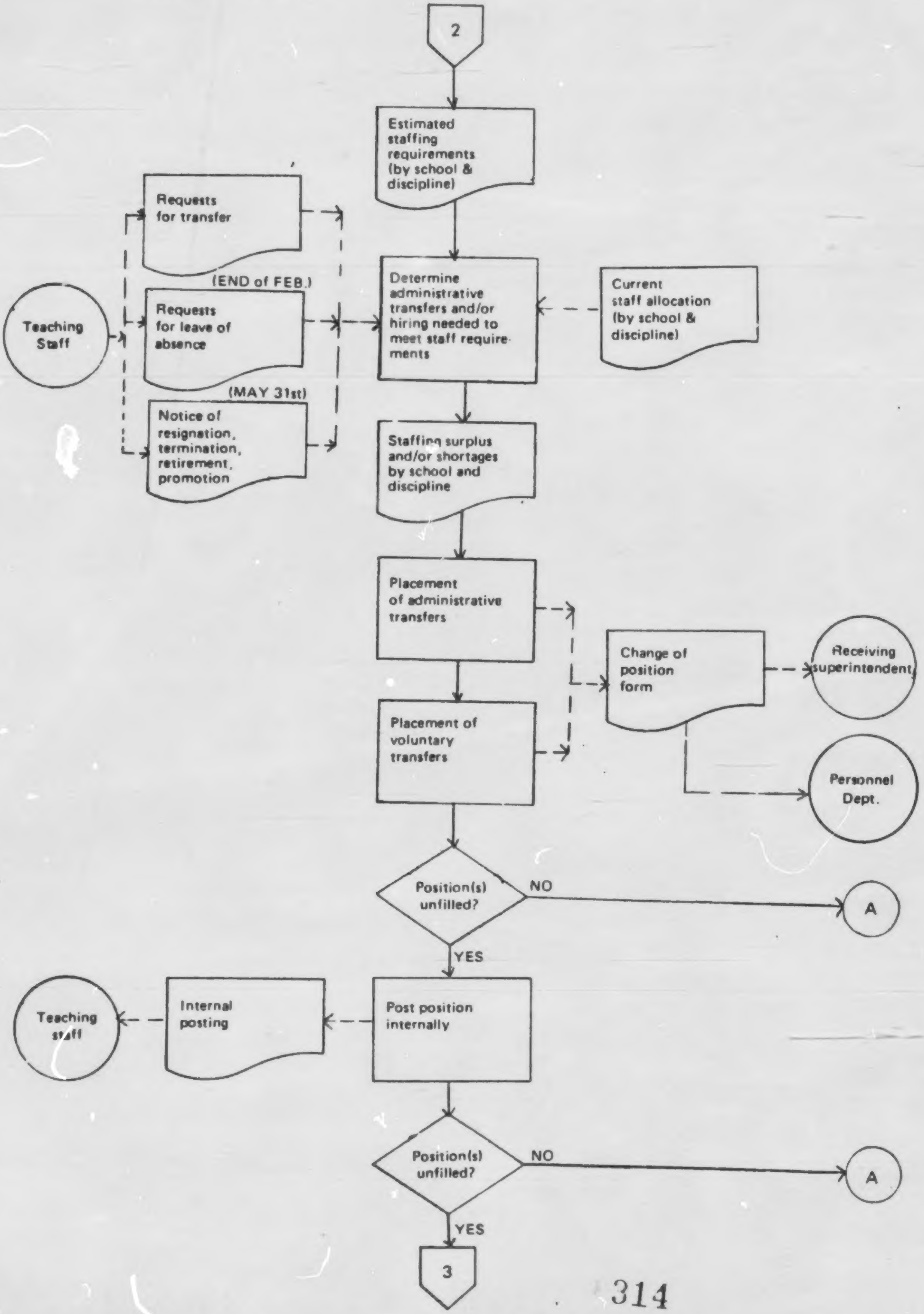
7.1.8 PERSONNEL ADMINISTRATION: Personnel Records


Current personnel info. held per teacher
Teachers
Corrected and updated info. and documentation of additional qualifications
Certificate Submission form (salary query)
(NOV.)
Determine changes in individual personnel records
Personnel updates additional documentation
Individual personnel back up file
Abstract and transform to machine readable form
Personnel data bank
Category change?
NO
YES
Notification of category change
Payroll file

7.2 PERSONNEL ADMINISTRATION: Allocation

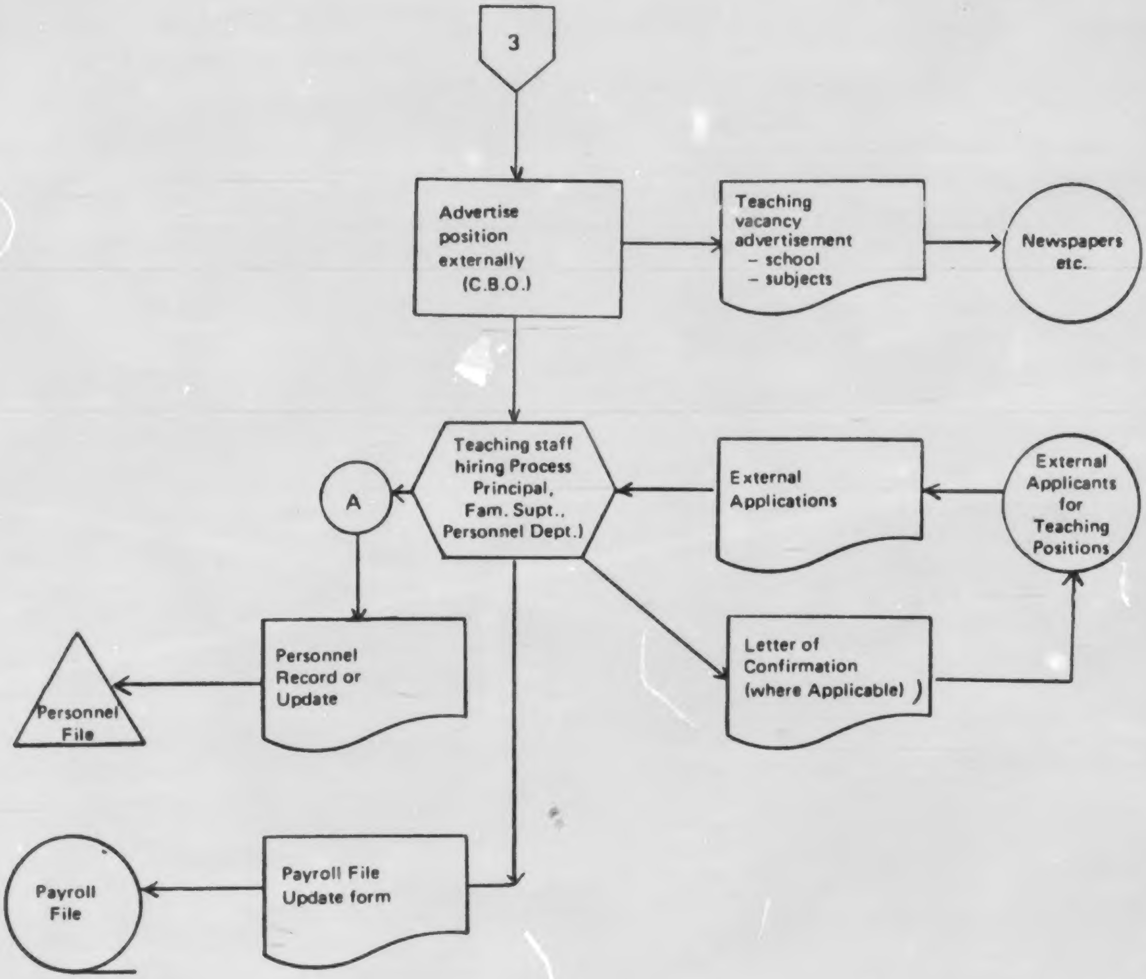
1 of 3


Teaching staff collective agreement
(JAN. 31st)
Planning department
Enrollment projections (by school)
Generate global staffing requirements
– Elementary
– Secondary
– Vocational
Board
Pupil/staff formulae (Board policy)
Global staffing requirements (by family of schools)
Elementary school distribution formula
Secondary school distribution formula
Area superintendent
Elementary school staff distribution (for each family of schools)
Generate staff distribution for elementary (for family of schools)
(MID FEB.)
Secondary school principal
Secondary school staff distribution (by school)
Generate staff distribution for secondary (by school)
2


2
Estimated staffing requirements (by school & discipline)
Teaching Staff
Requests for transfer
(END of FEB.)
Requests for leave of absence
(MAY 31st)
Notice of resignation, termination, retirement, promotion
Determine administrative transfers and/or hiring needed to meet staff requirements
Current staff allocation (by school & discipline)
Staffing surplus and/or shortages by school and discipline
Placement of administrative transfers
Placement of voluntary transfers
Change of position form
Receiving superintendent
Personnel Dept.
Position(s) unfilled?
NO
A
YES
Teaching staff
Internal posting
Post position internally
Position(s) unfilled?
NO
A
YES
3

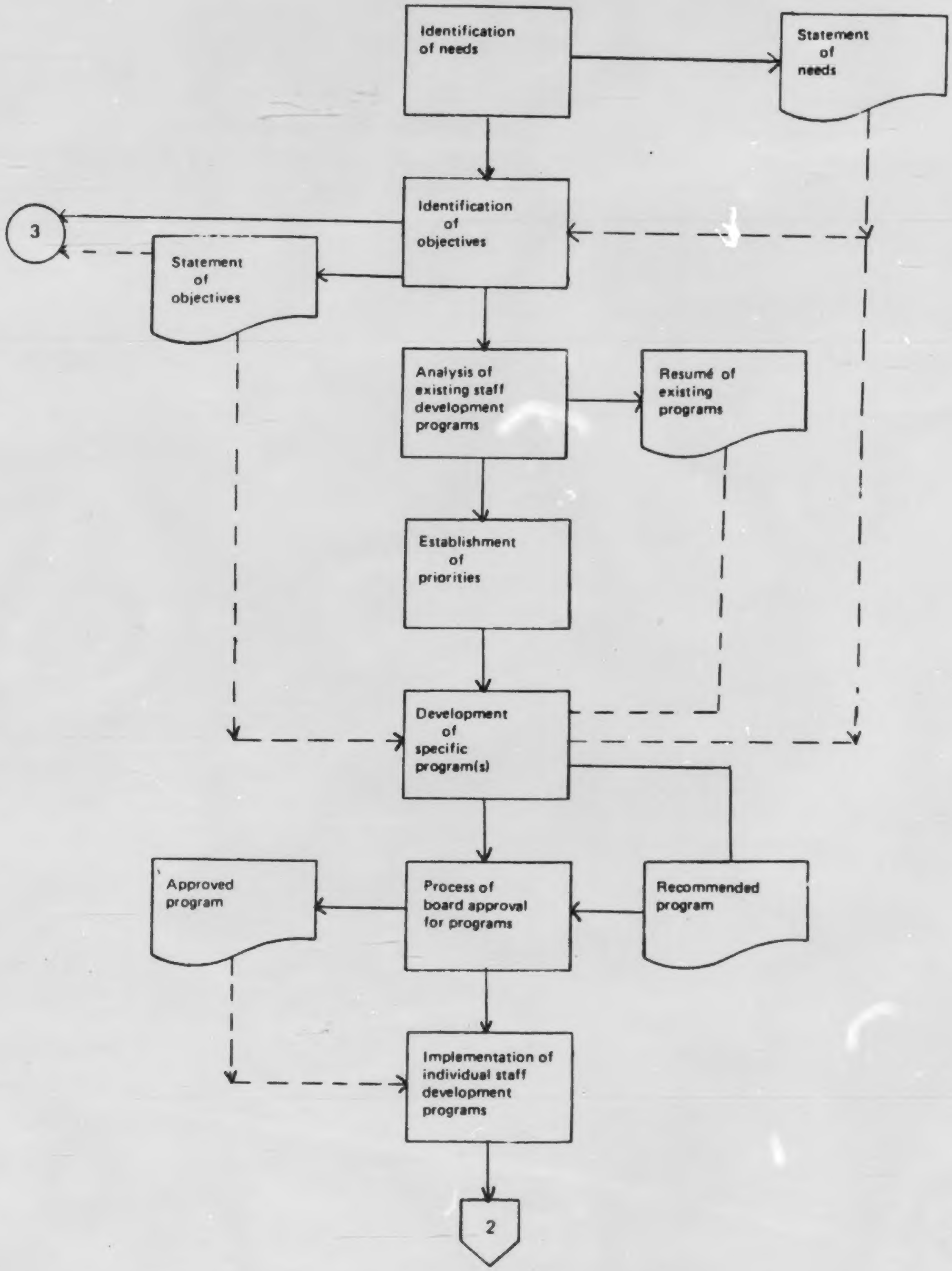
7.2 (cont'd)

3 of 3


3
Advertise position externally (C.B.O.)
Teaching vacancy advertisement – school – subjects
Newspapers etc.
Teaching staff hiring Process Principal, Fam. Supt., Personnel Dept.)
External Applications
External Applicants for Teaching Positions
A
Letter of Confirmation (where Applicable)
Personnel Record or Update
Personnel File
Payroll File Update form
Payroll File

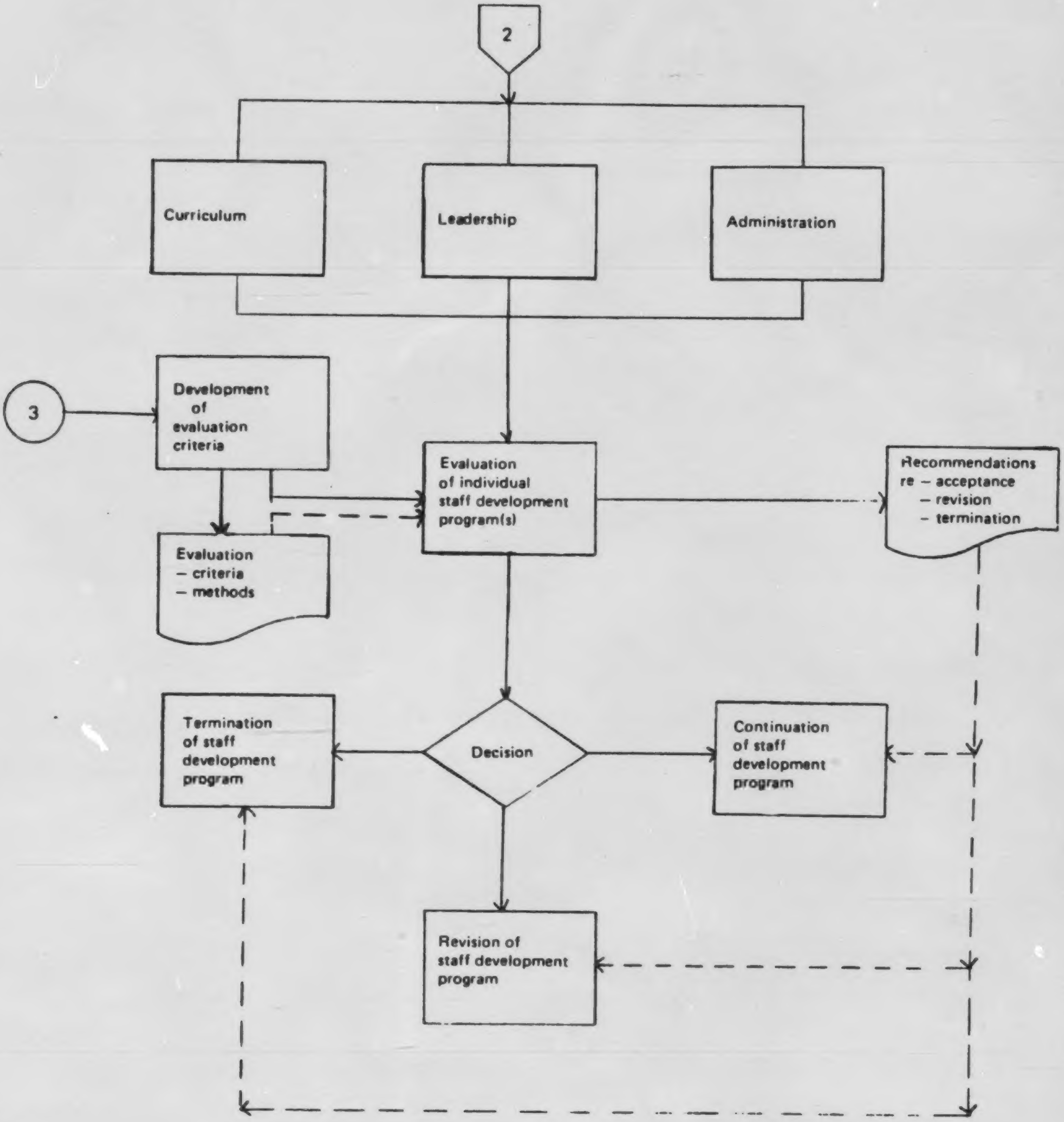
8.1 STAFF DEVELOPMENT AND RELATIONS – Staff Development

1 of 2

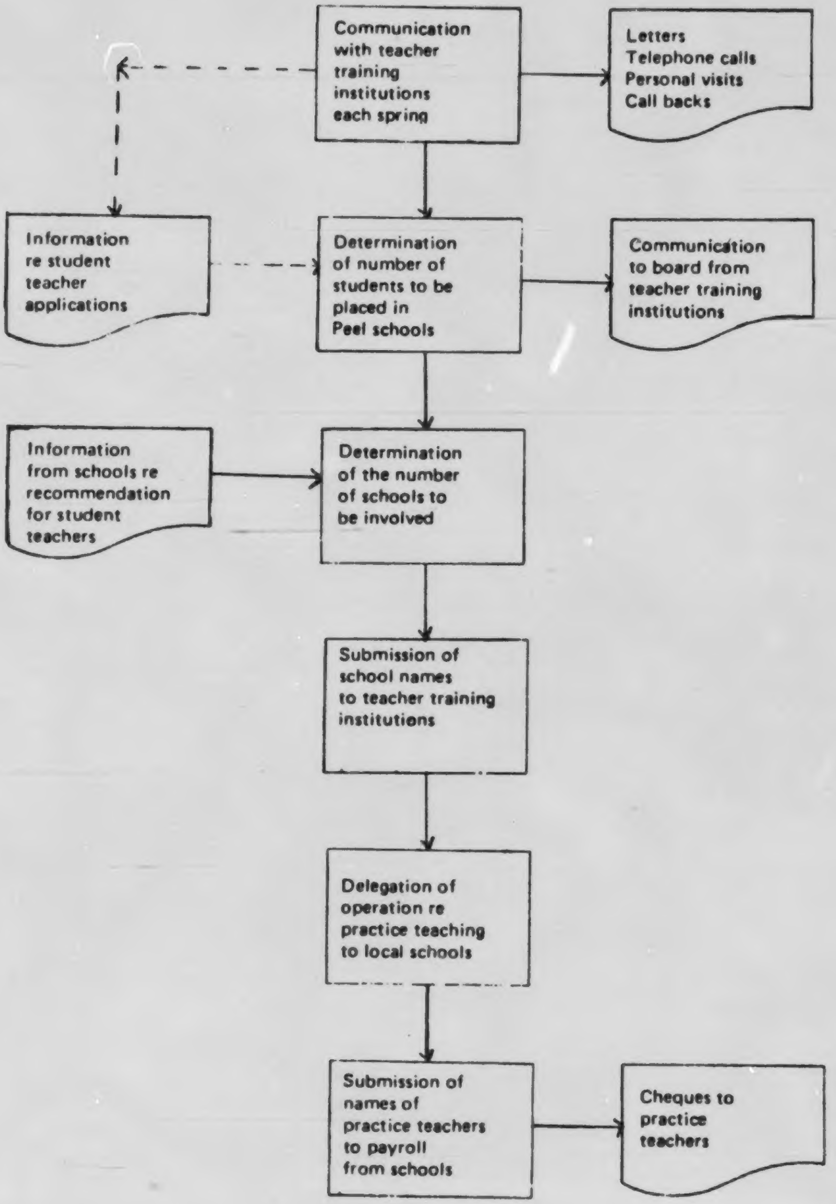

Identification of needs
Statement of needs
Identification of objectives
3
Statement of objectives
Analysis of existing staff development programs
Resumé of existing programs
Establishment of priorities
Development of specific program(s)
Approved program
Process of board approval for programs
Recommended program
Implementation of individual staff development programs
2

8.1 (cont'd)

2 of 2

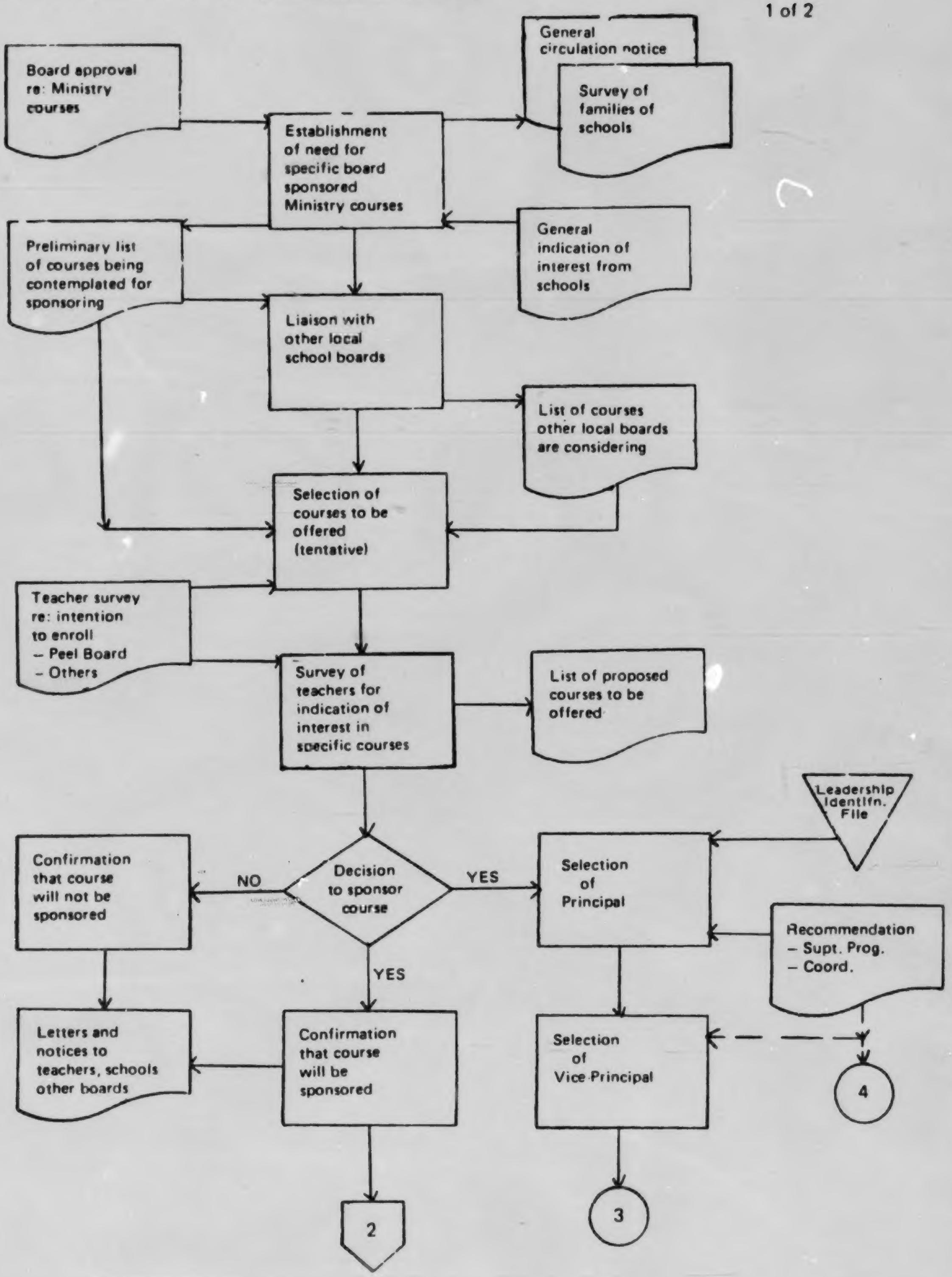

2
Curriculum
Leadership
Administration
3
Development of evaluation criteria
Evaluation – criteria – methods
Evaluation of individual staff development program(s)
Recommendations re – acceptance – revision – termination
Termination of staff development program
Decision
Continuation of staff development program
Revision of staff development program

8.1.1 STAFF DEVELOPMENT AND RELATIONS: DEVELOPMENT — Liaison with Teacher Training Institutions


Communication with teacher training institutions each spring
Letters
Telephone calls
Personal visits
Call backs
Information re student teacher applications
Determination of number of students to be placed in Peel schools
Communication to board from teacher training institutions
Information from schools re recommendation for student teachers
Determination of the number of schools to be involved
Submission of school names to teacher training institutions
Delegation of operation re practice teaching to local schools
Submission of names of practice teachers to payroll from schools
Cheques to practice teachers

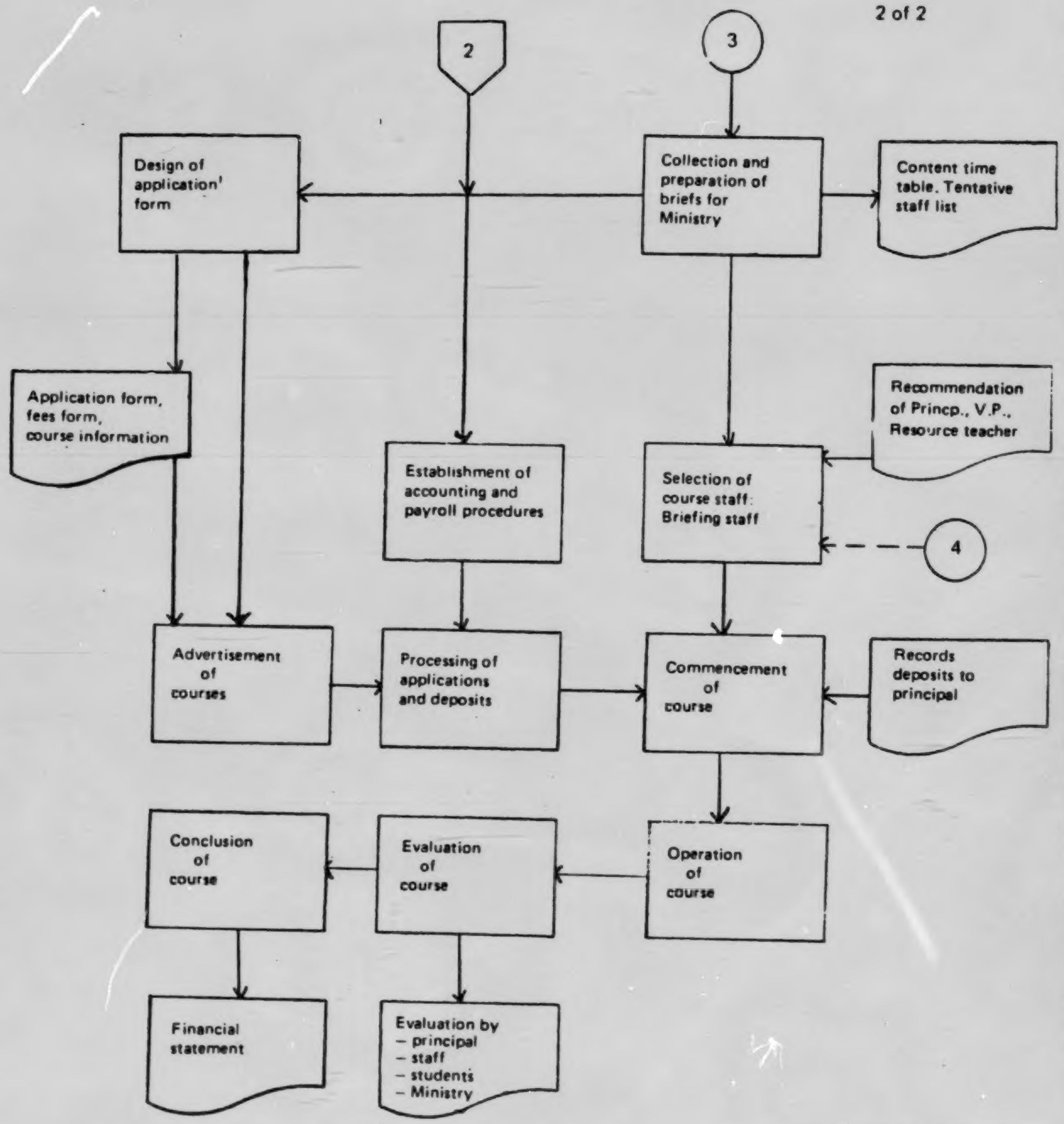
8.1.2 STAFF DEVELOPMENT: Board Sponsored Ministry Courses

1 of 2

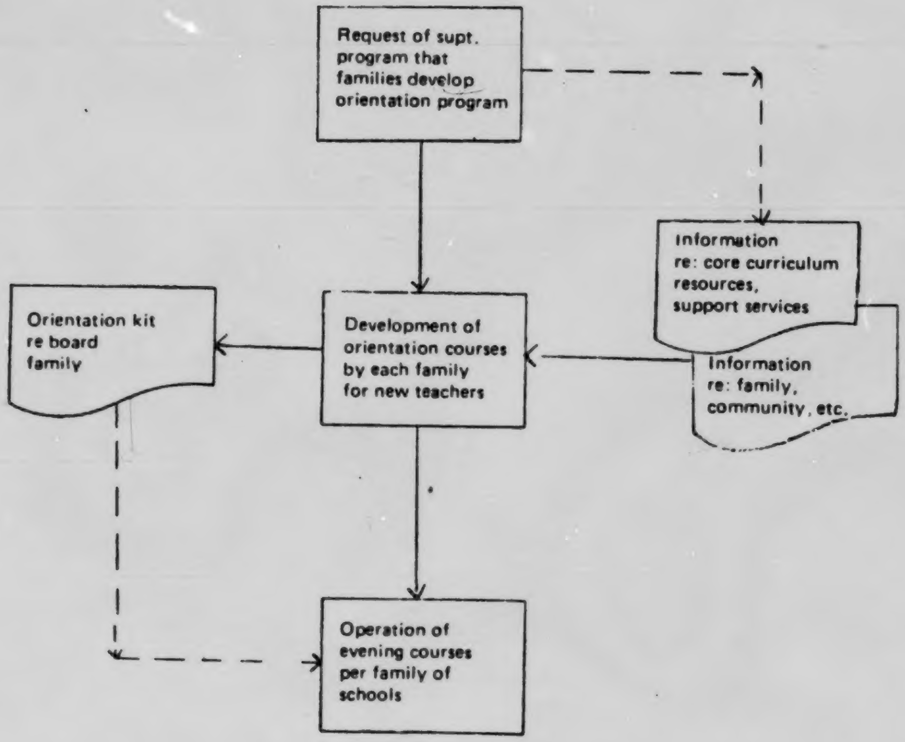

Board approval re: Ministry courses
General circulation notice
Survey of families of schools
Establishment of need for specific board sponsored Ministry courses
Preliminary list of courses being contemplated for sponsoring
General indication of interest from schools
Liaison with other local school boards
List of courses other local boards are considering
Selection of courses to be offered (tentative)
Teacher survey re: intention to enroll
– Peel Board
– Others
Survey of teachers for indication of interest in specific courses
List of proposed courses to be offered
Leadership Identifn. File
Confirmation that course will not be sponsored
NO
Decision to sponsor course
YES
Selection of Principal
Recommendation
– Supt. Prog.
– Coord.
YES
Letters and notices to teachers, schools other boards
Confirmation that course will be sponsored
Selection of Vice-Principal
4
2
3

8.1.2 (cont'd)

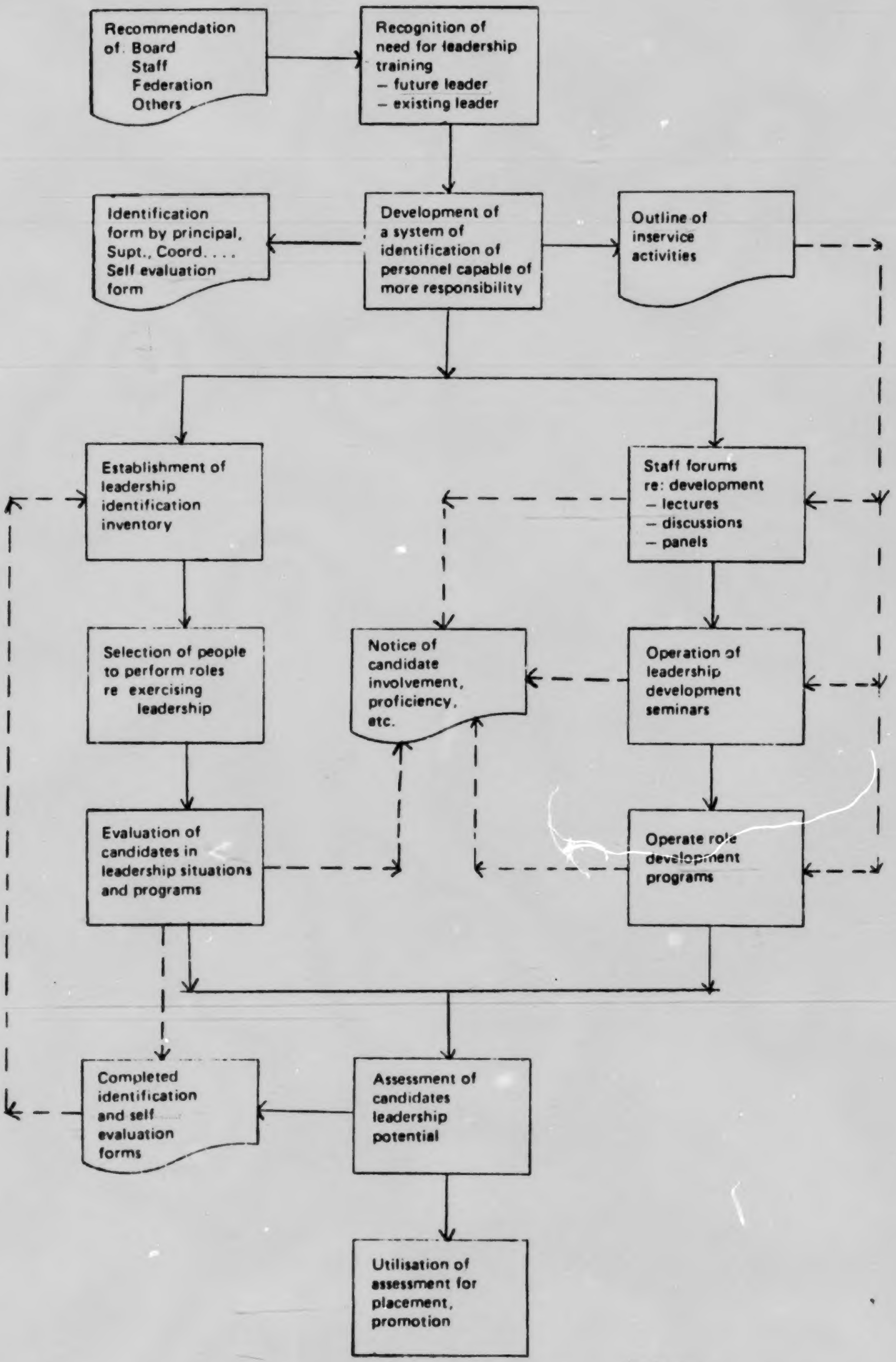
2 of 2


2
3
Design of application form
Collection and preparation of briefs for Ministry
Content time table, Tentative staff list
Application form, fees form, course information
Recommendation of Princp., V.P., Resource teacher
Establishment of accounting and payroll procedures
Selection of course staff: Briefing staff
4
Advertisement of courses
Processing of applications and deposits
Commencement of course
Records deposits to principal
Conclusion of course
Evaluation of course
Operation of course
Financial statement
Evaluation by
– principal
– staff
– students
– Ministry

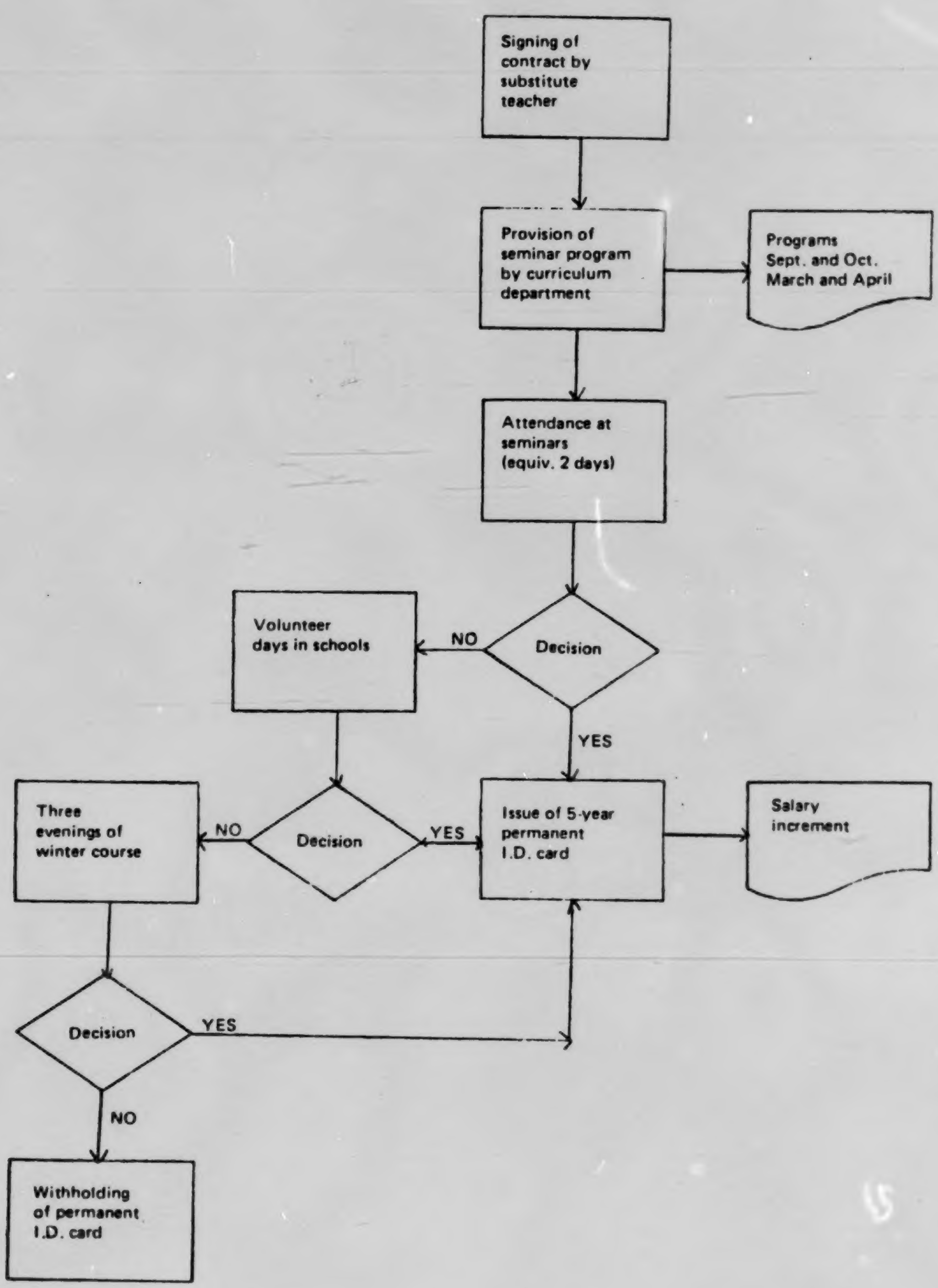
8.1.3.1 STAFF DEVELOPMENT: Credit and Non Credit Courses – New Teachers


Request of supt. program that families develop orientation program
Information re: core curriculum resources, support services
Orientation kit re board family
Development of orientation courses by each family for new teachers
Information re: family, community, etc.
Operation of evening courses per family of schools

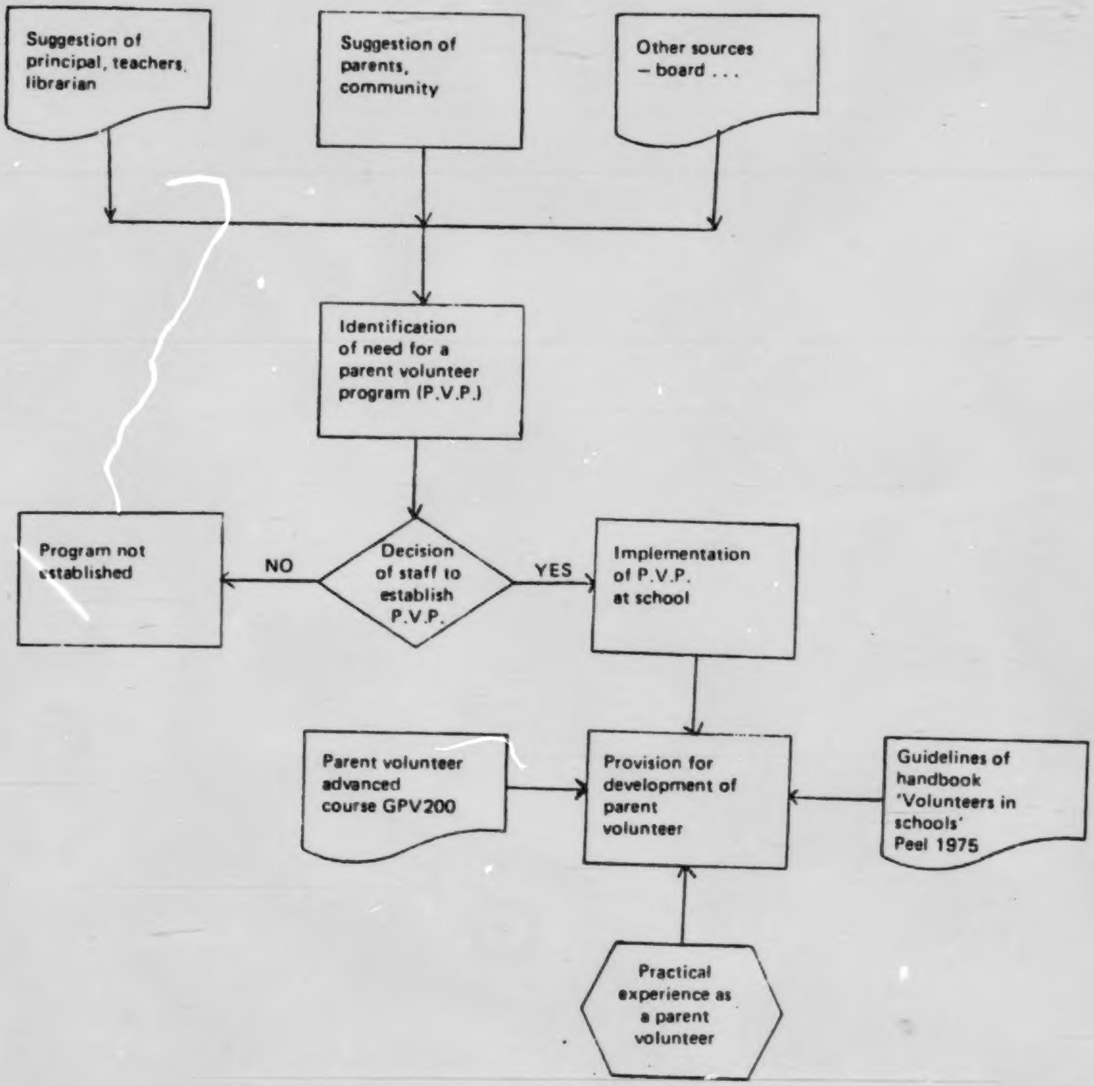
8.1.3.3 STAFF DEVELOPMENT: Credit and Non-credit Courses – Leadership Development


Recommendation of. Board Staff Federation Others
Recognition of need for leadership training – future leader – existing leader
Identification form by principal, Supt., Coord. . . . Self evaluation form
Development of a system of identification of personnel capable of more responsibility
Outline of inservice activities
Establishment of leadership identification inventory
Staff forums re: development – lectures – discussions – panels
Selection of people to perform roles re exercising leadership
Notice of candidate involvement, proficiency, etc.
Operation of leadership development seminars
Evaluation of candidates in leadership situations and programs
Operate role development programs
Completed identification and self evaluation forms
Assessment of candidates leadership potential
Utilisation of assessment for placement, promotion

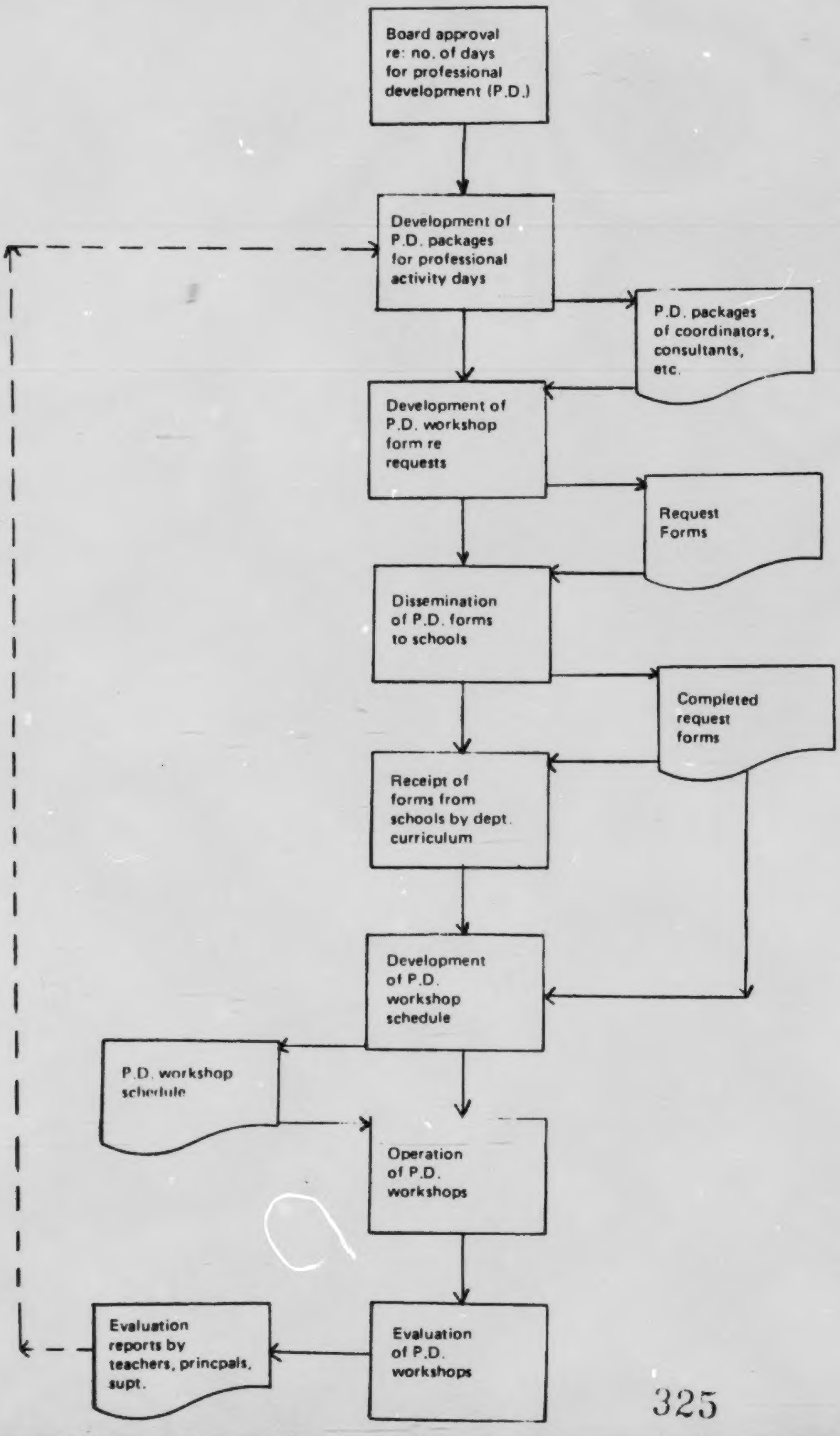
8.1.3.4 STAFF DEVELOPMENT: Credit and Non-credit Courses – Substitute Teachers


Signing of contract by substitute teacher
Provision of seminar program by curriculum department
Programs Sept. and Oct. March and April
Attendance at seminars (equiv. 2 days)
Decision
NO
Volunteer days in schools
YES
Decision
NO
YES
Three evenings of winter course
Issue of 5-year permanent I.D. card
Salary increment
Decision
YES
NO
Withholding of permanent I.D. card

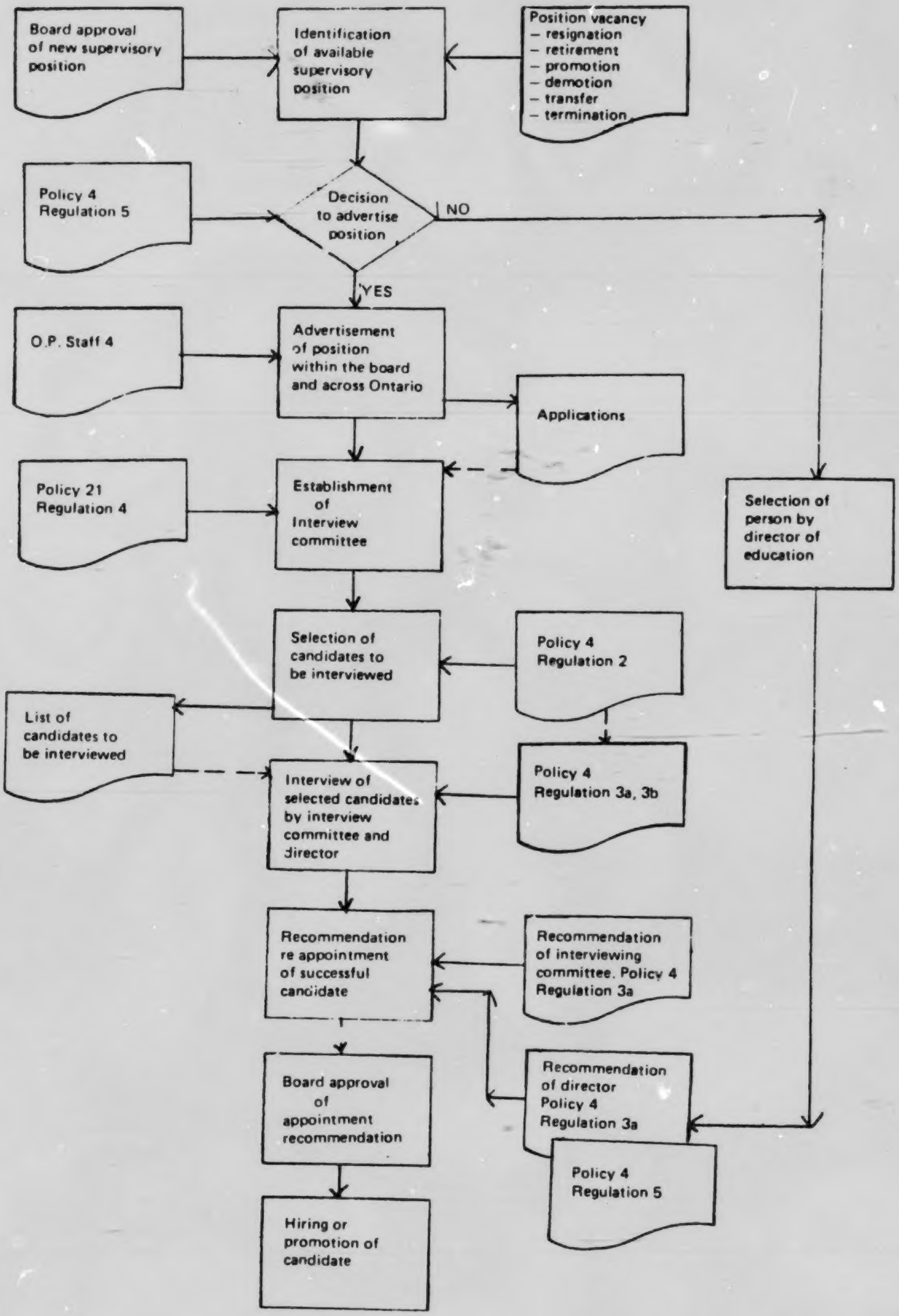
8.1.3.5 STAFF DEVELOPMENT: Credit and Non-credit Courses – Parent Volunteers


Suggestion of principal, teachers, librarian
Suggestion of parents, community
Other sources – board . . .
Identification of need for a parent volunteer program (P.V.P.)
Program not established
NO
Decision of staff to establish P.V.P.
YES
Implementation of P.V.P. at school
Parent volunteer advanced course GPV200
Provision for development of parent volunteer
Guidelines of handbook 'Volunteers in schools' Peel 1975
Practical experience as a parent volunteer

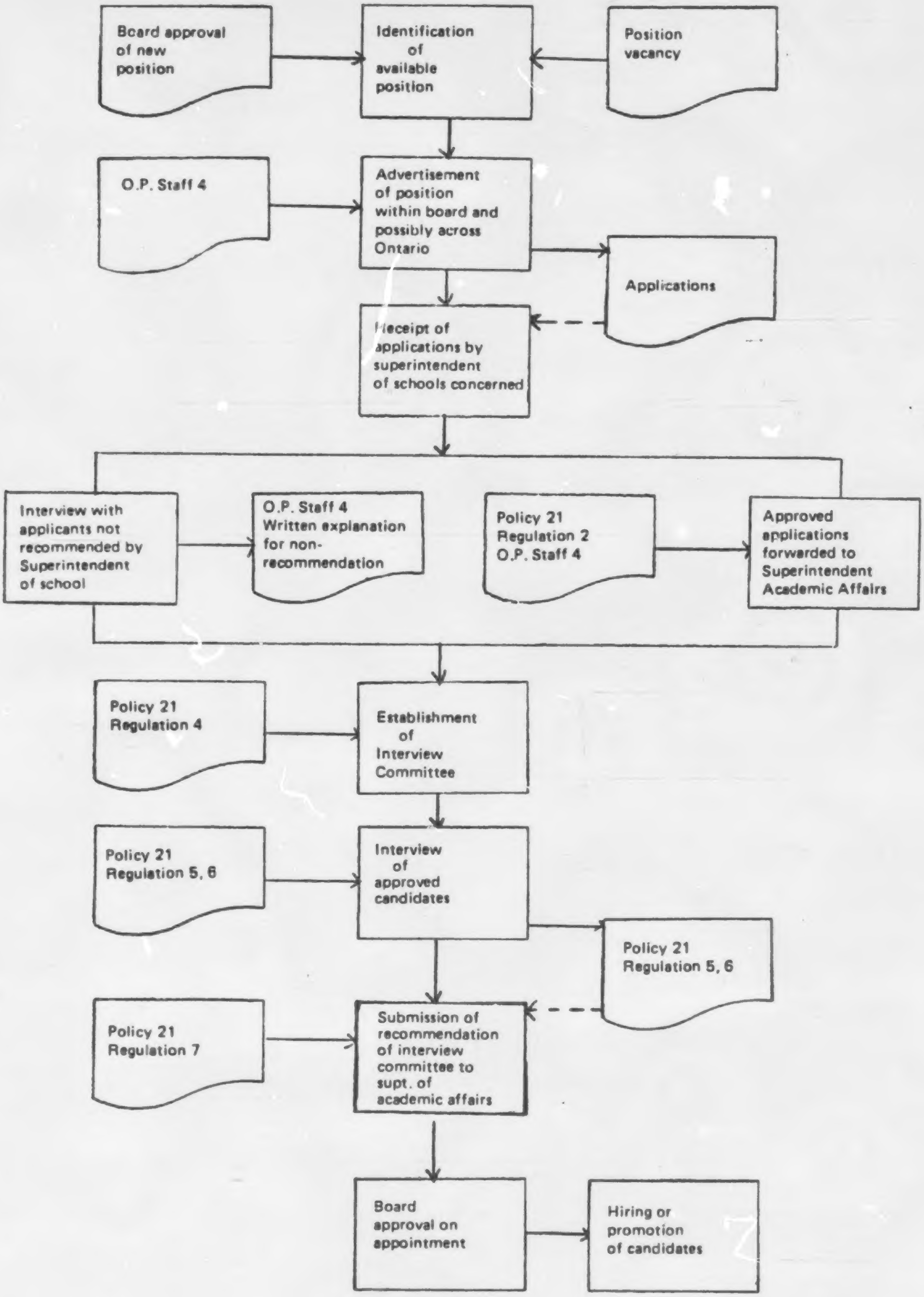
8.1.9 STAFF DEVELOPMENT: Professional Activity Days


Board approval re: no. of days for professional development (P.D.)
Development of P.D. packages for professional activity days
P.D. packages of coordinators, consultants, etc.
Development of P.D. workshop form re requests
Request Forms
Dissemination of P.D. forms to schools
Completed request forms
Receipt of forms from schools by dept. curriculum
Development of P.D. workshop schedule
P.D. workshop schedule
Operation of P.D. workshops
Evaluation of P.D. workshops
Evaluation reports by teachers, princpals, supt.

8.2.2 STAFF RELATIONS: Appointment of Administrative and Supervisory Personnel

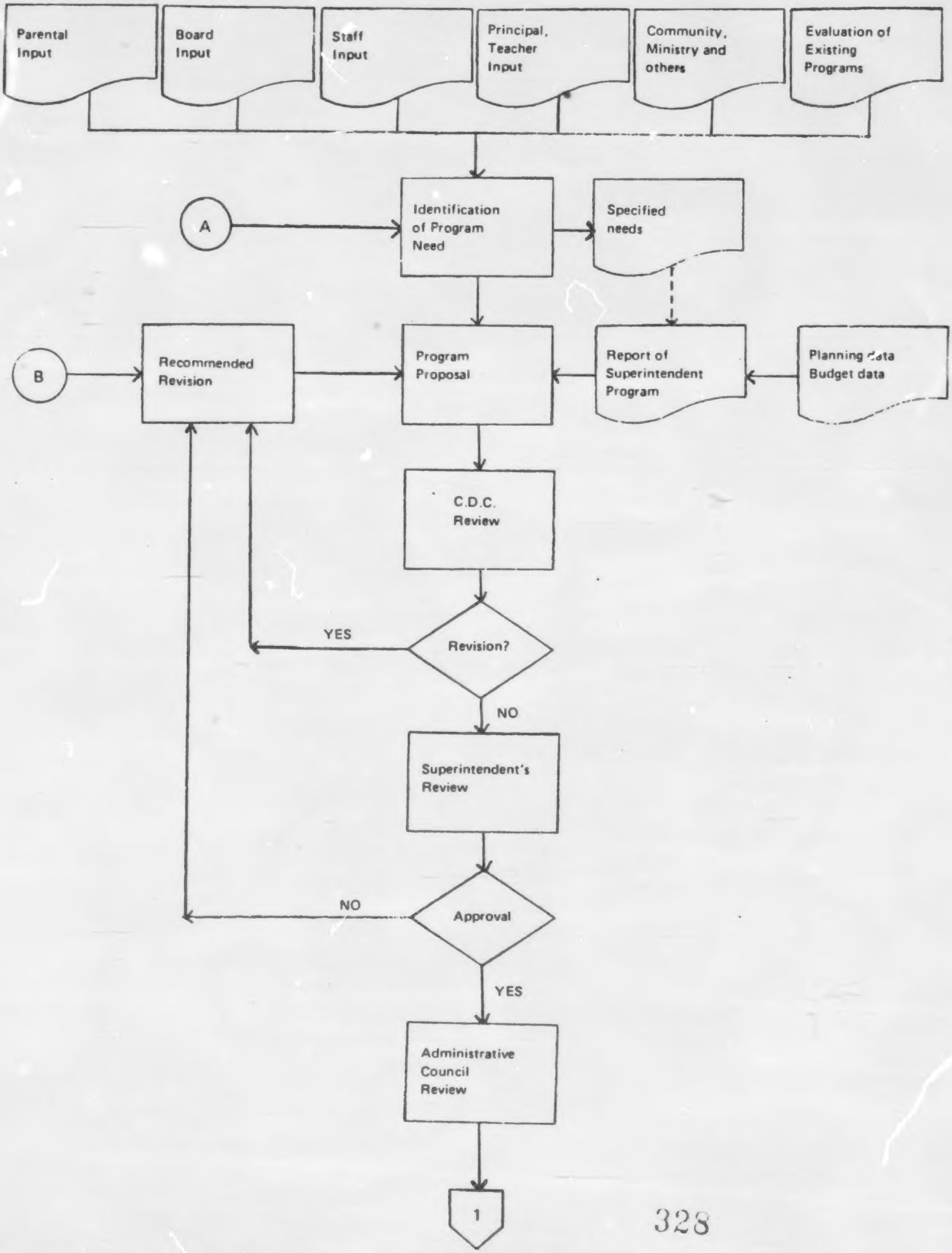

Board approval of new supervisory position
Identification of available supervisory position
Position vacancy
– resignation
– retirement
– promotion
– demotion
– transfer
– termination
Policy 4 Regulation 5
Decision to advertise position
NO
YES
O.P. Staff 4
Advertisement of position within the board and across Ontario
Applications
Policy 21 Regulation 4
Establishment of Interview committee
Selection of person by director of education
Selection of candidates to be interviewed
Policy 4 Regulation 2
List of candidates to be interviewed
Interview of selected candidates by interview committee and director
Policy 4 Regulation 3a, 3b
Recommendation re appointment of successful candidate
Recommendation of interviewing committee. Policy 4 Regulation 3a
Recommendation of director Policy 4 Regulation 3a
Policy 4 Regulation 5
Board approval of appointment recommendation
Hiring or promotion of candidate

8.2.3 STAFF RELATIONS: Appointment of Principals, Vice-Principals, etc.


Board approval of new position
Identification of available position
Position vacancy
O.P. Staff 4
Advertisement of position within board and possibly across Ontario
Applications
Receipt of applications by superintendent of schools concerned
Interview with applicants not recommended by Superintendent of school
O.P. Staff 4 Written explanation for non-recommendation
Policy 21 Regulation 2 O.P. Staff 4
Approved applications forwarded to Superintendent Academic Affairs
Policy 21 Regulation 4
Establishment of Interview Committee
Policy 21 Regulation 5, 6
Interview of approved candidates
Policy 21 Regulation 5, 6
Policy 21 Regulation 7
Submission of recommendation of interview committee to supt. of academic affairs
Board approval on appointment
Hiring or promotion of candidates

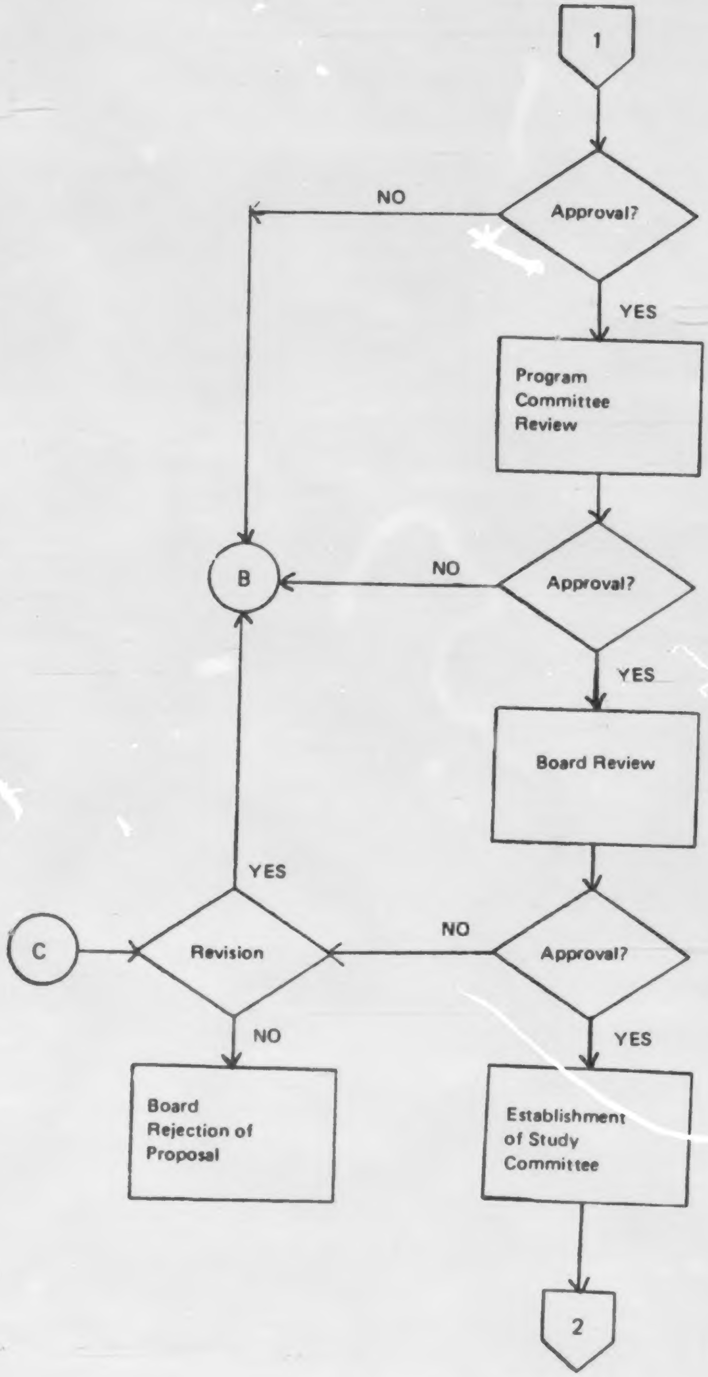
9.0 SCHOOL CURRICULUM (PROGRAM)

1 of 5


Parental Input
Board Input
Staff Input
Principal, Teacher Input
Community, Ministry and others
Evaluation of Existing Programs
A
Identification of Program Need
Specified needs
B
Recommended Revision
Program Proposal
Report of Superintendent Program
Planning data Budget data
C.D.C. Review
YES
Revision?
NO
Superintendent's Review
NO
Approval
YES
Administrative Council Review
1

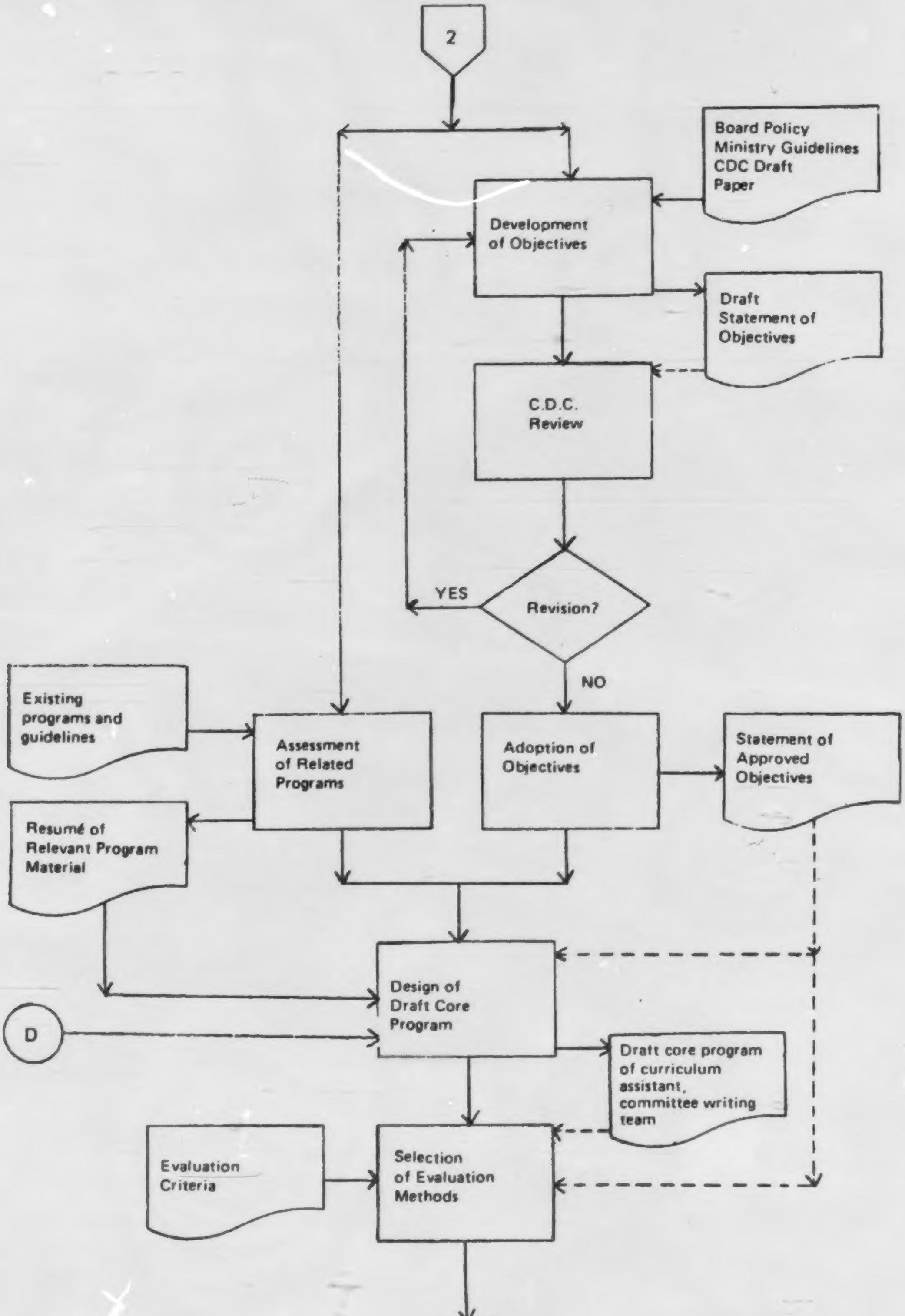
9.0 (cont'd)

2 of 5


1
Approval?
NO
YES
Program Committee Review
Approval?
NO
B
YES
Board Review
YES
C
Revision
NO
Approval?
NO
YES
Board Rejection of Proposal
Establishment of Study Committee
2

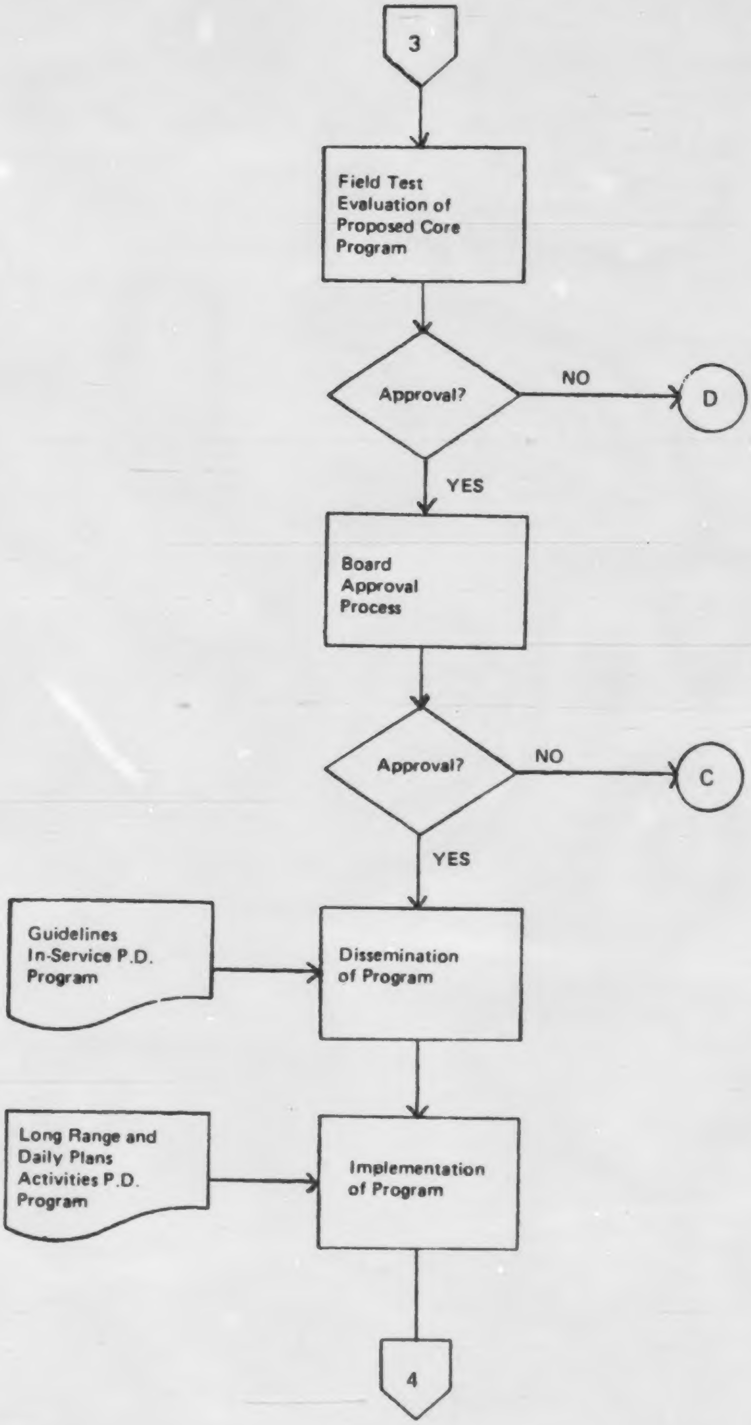
9.0 (cont'd)

3 of 5


2
Board Policy
Ministry Guidelines
CDC Draft
Paper
Development of Objectives
Draft Statement of Objectives
C.D.C. Review
YES
Revision?
NO
Existing programs and guidelines
Assessment of Related Programs
Adoption of Objectives
Statement of Approved Objectives
Resumé of Relevant Program Material
Design of Draft Core Program
D
Draft core program of curriculum assistant, committee writing team
Evaluation Criteria
Selection of Evaluation Methods
3

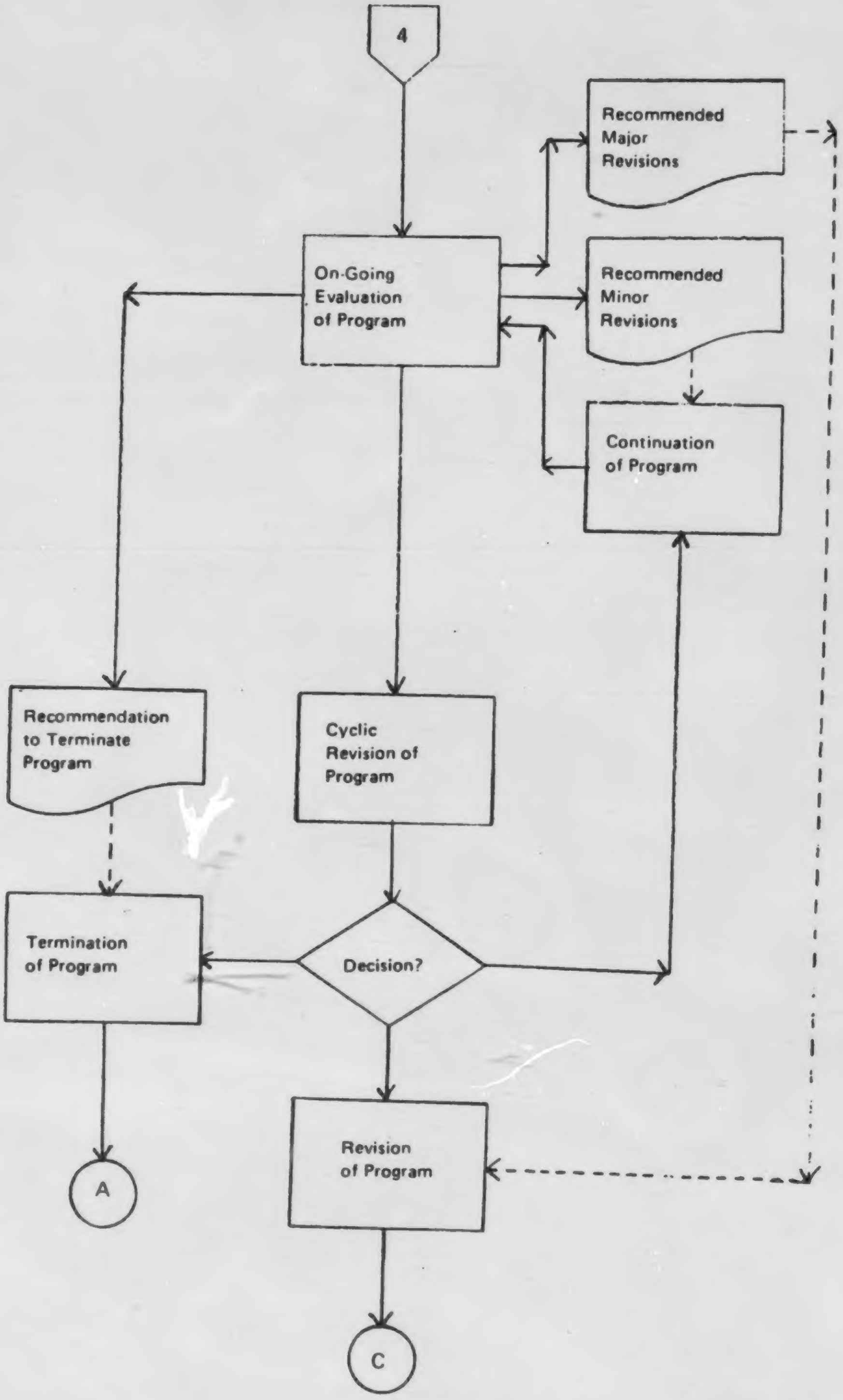
9.0 (cont'd)

4 of 5

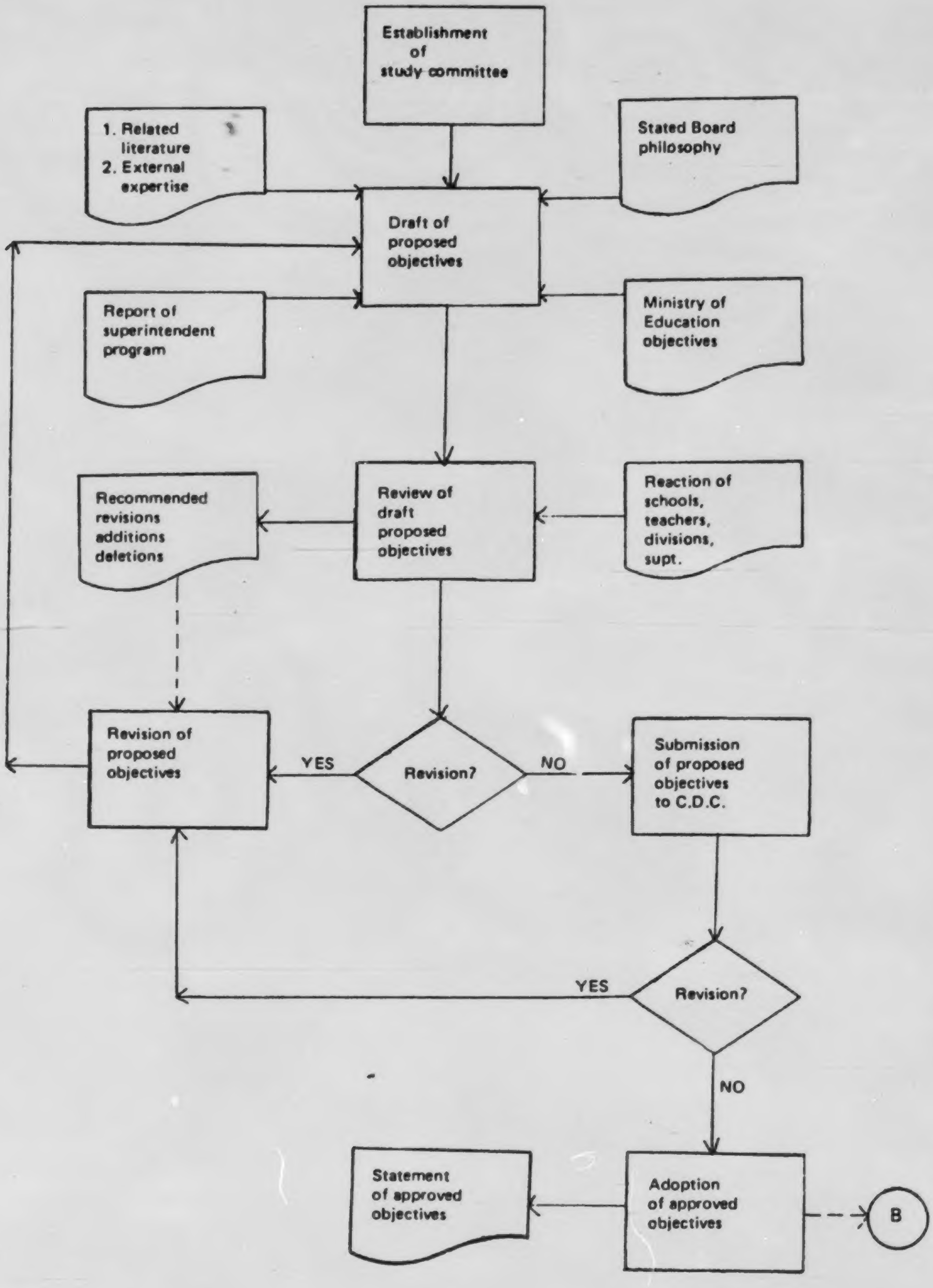

3
Field Test Evaluation of Proposed Core Program
Approval?
NO
D
YES
Board Approval Process
Approval?
NO
C
YES
Guidelines In-Service P.D. Program
Dissemination of Program
Long Range and Daily Plans Activities P.D. Program
Implementation of Program
4

9.0 (cont'd)

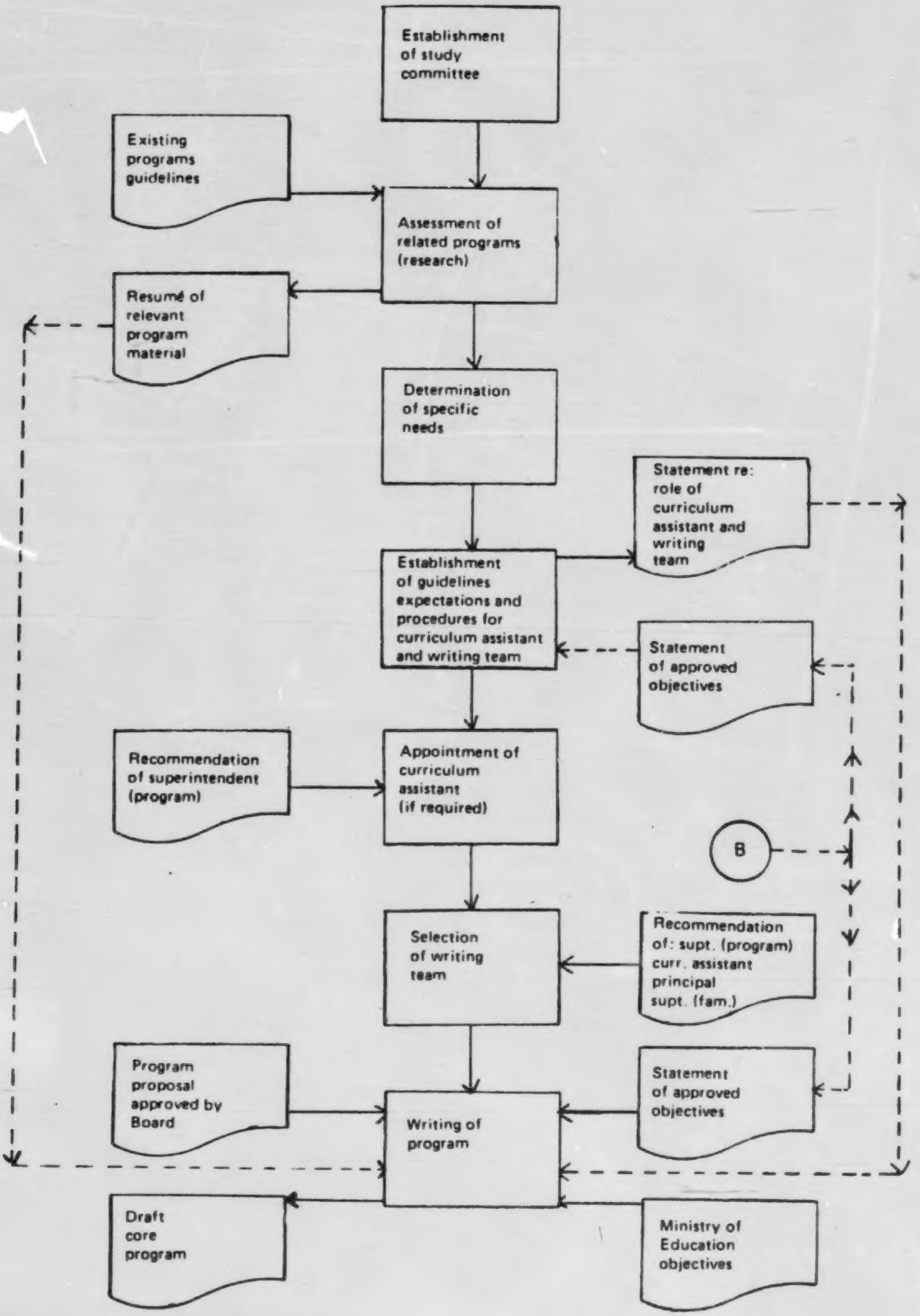
5 of 5


4
On-Going Evaluation of Program
Recommended Major Revisions
Recommended Minor Revisions
Continuation of Program
Recommendation to Terminate Program
Cyclic Revision of Program
Decision?
Termination of Program
Revision of Program
A
C

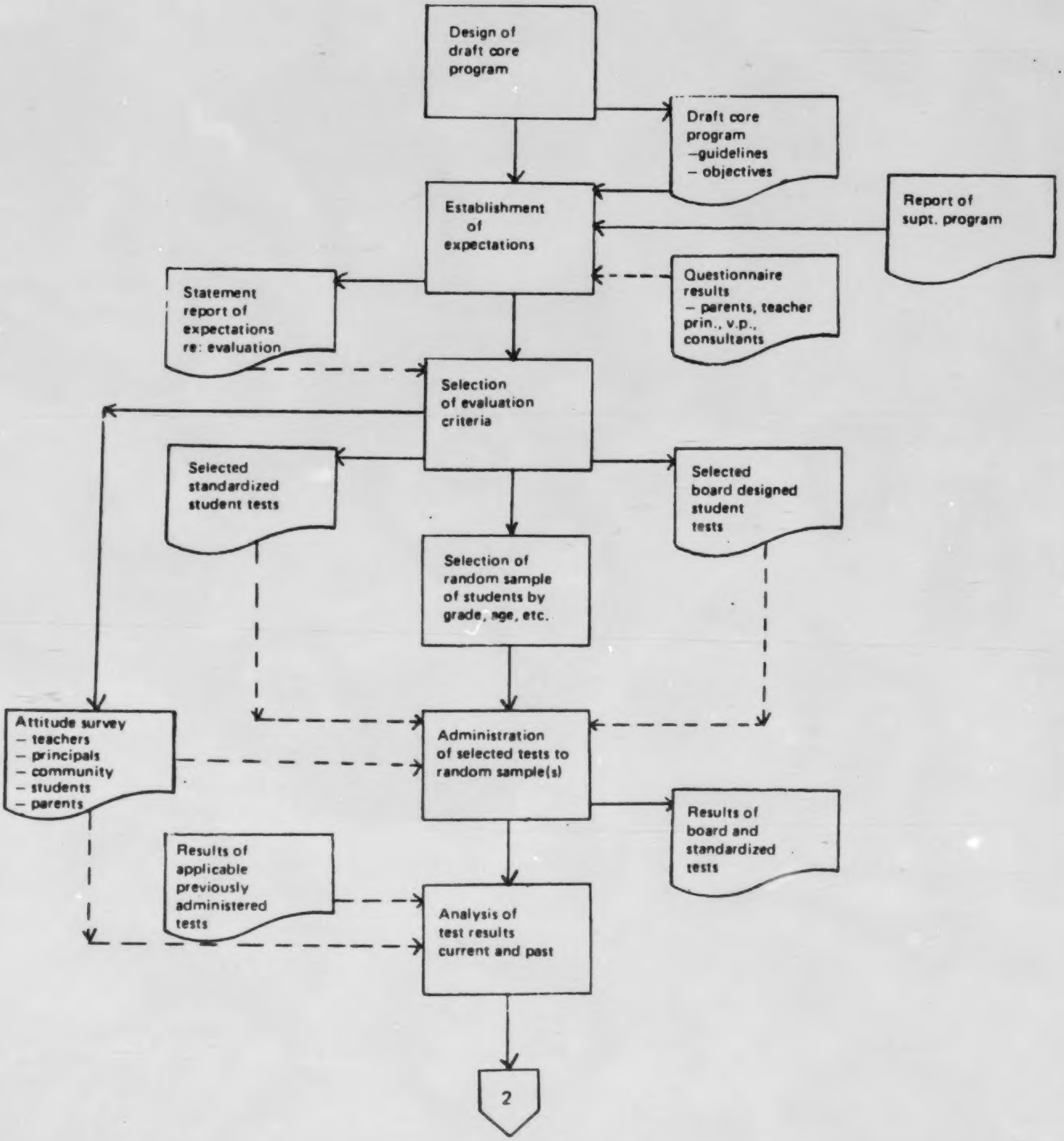
9.1.1 SCHOOL CURRICULUM (PROGRAM): Program Development and Evaluation – Development of Objectives


Establishment of study committee
1. Related literature 2. External expertise
Stated Board philosophy
Draft of proposed objectives
Report of superintendent program
Ministry of Education objectives
Recommended revisions additions deletions
Review of draft proposed objectives
Reaction of schools, teachers, divisions, supt.
Revision of proposed objectives
YES
Revision?
NO
Submission of proposed objectives to C.D.C.
YES
Revision?
NO
Statement of approved objectives
Adoption of approved objectives
B

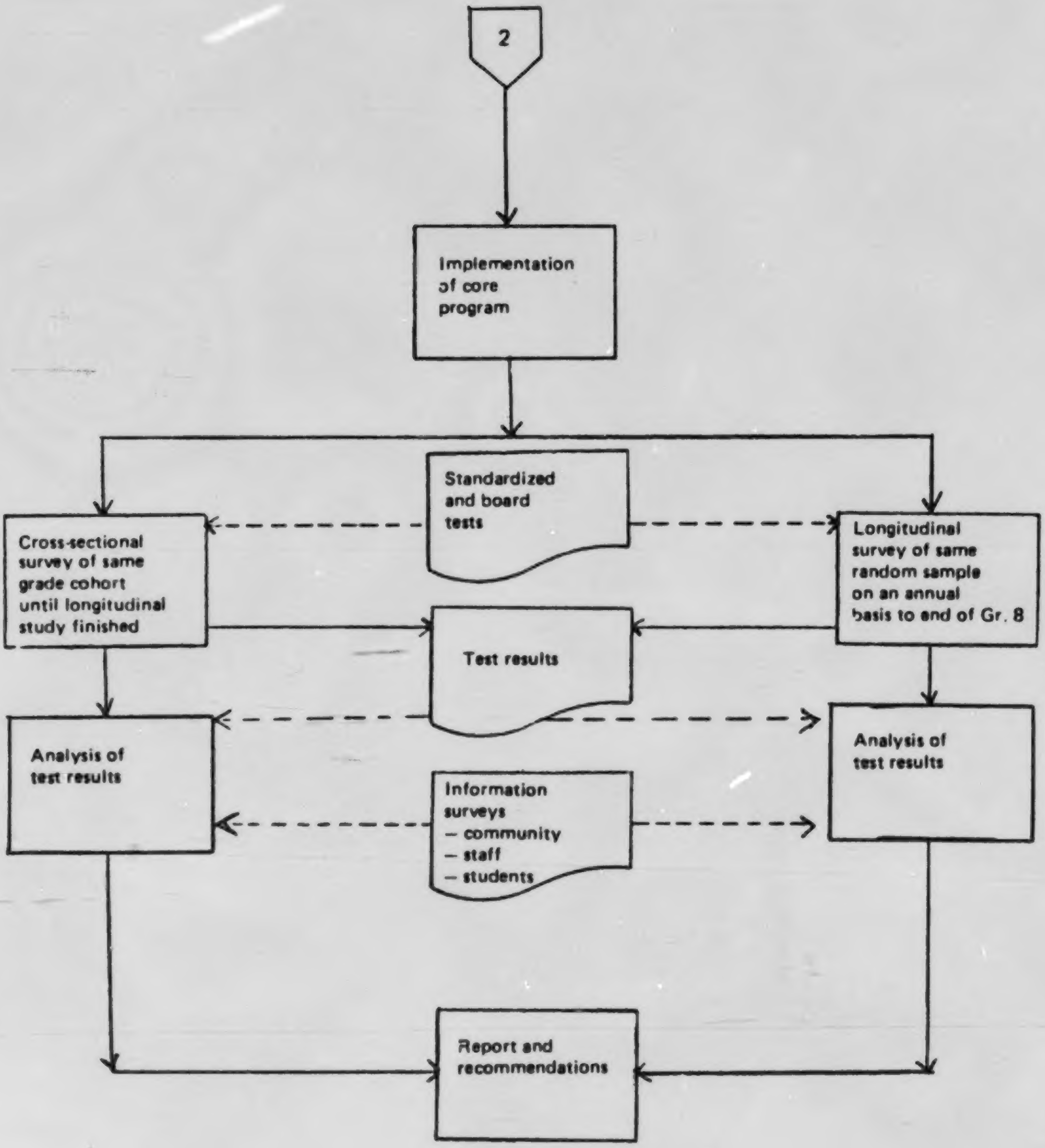
9.1.2 SCHOOL CURRICULUM (PROGRAM): Program Development and Evaluation Design of Draft Core Program


Establishment of study committee
Existing programs guidelines
Assessment of related programs (research)
Resumé of relevant program material
Determination of specific needs
Statement re: role of curriculum assistant and writing team
Establishment of guidelines expectations and procedures for curriculum assistant and writing team
Statement of approved objectives
Recommendation of superintendent (program)
Appointment of curriculum assistant (if required)
B
Selection of writing team
Recommendation of: supt. (program) curr. assistant principal supt. (fam.)
Program proposal approved by Board
Writing of program
Statement of approved objectives
Draft core program
Ministry of Education objectives

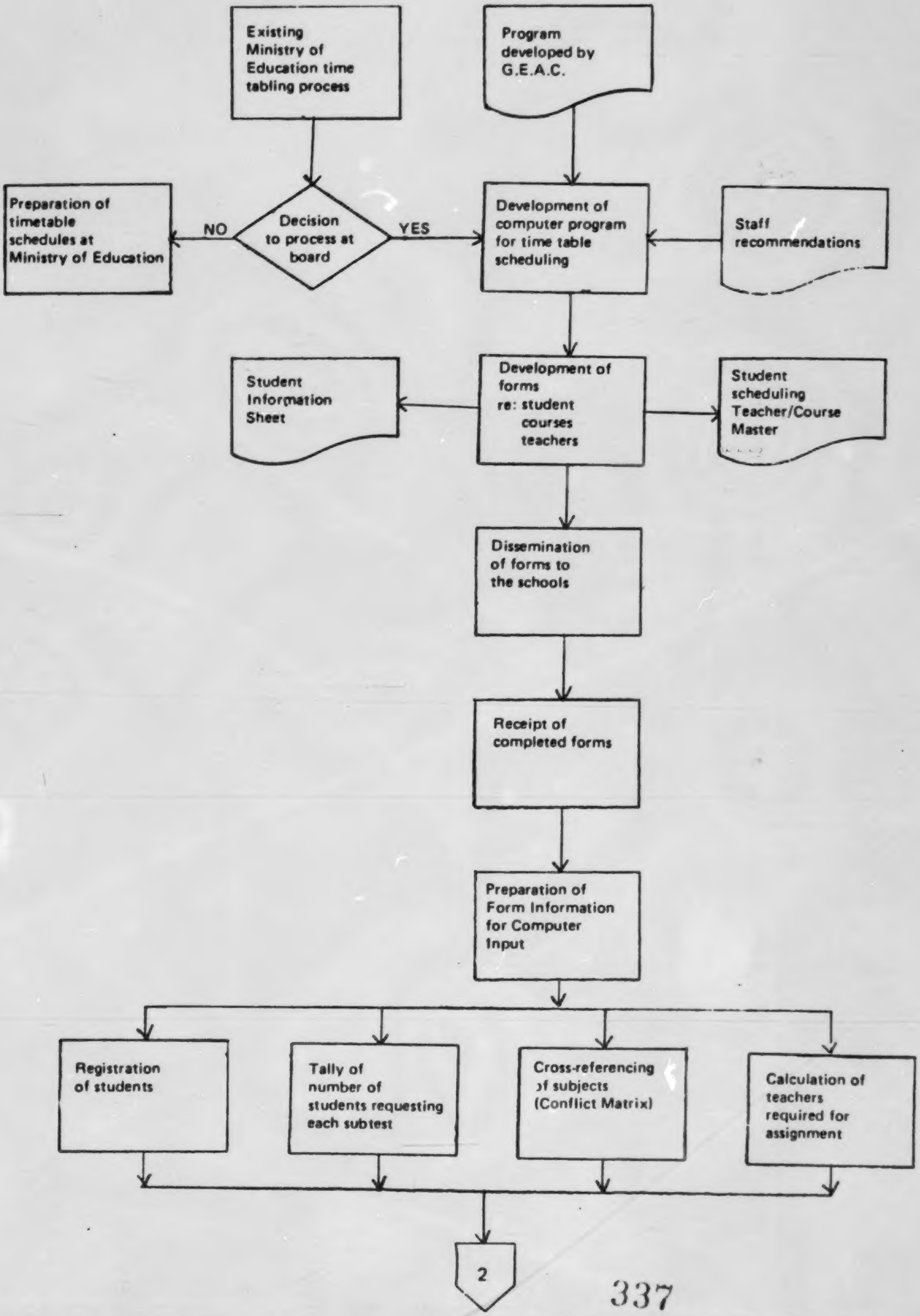
9.1.3 SCHOOL CURRICULUM (PROGRAM): Program Development and Evaluation
– Evaluation of Program 1 of 2

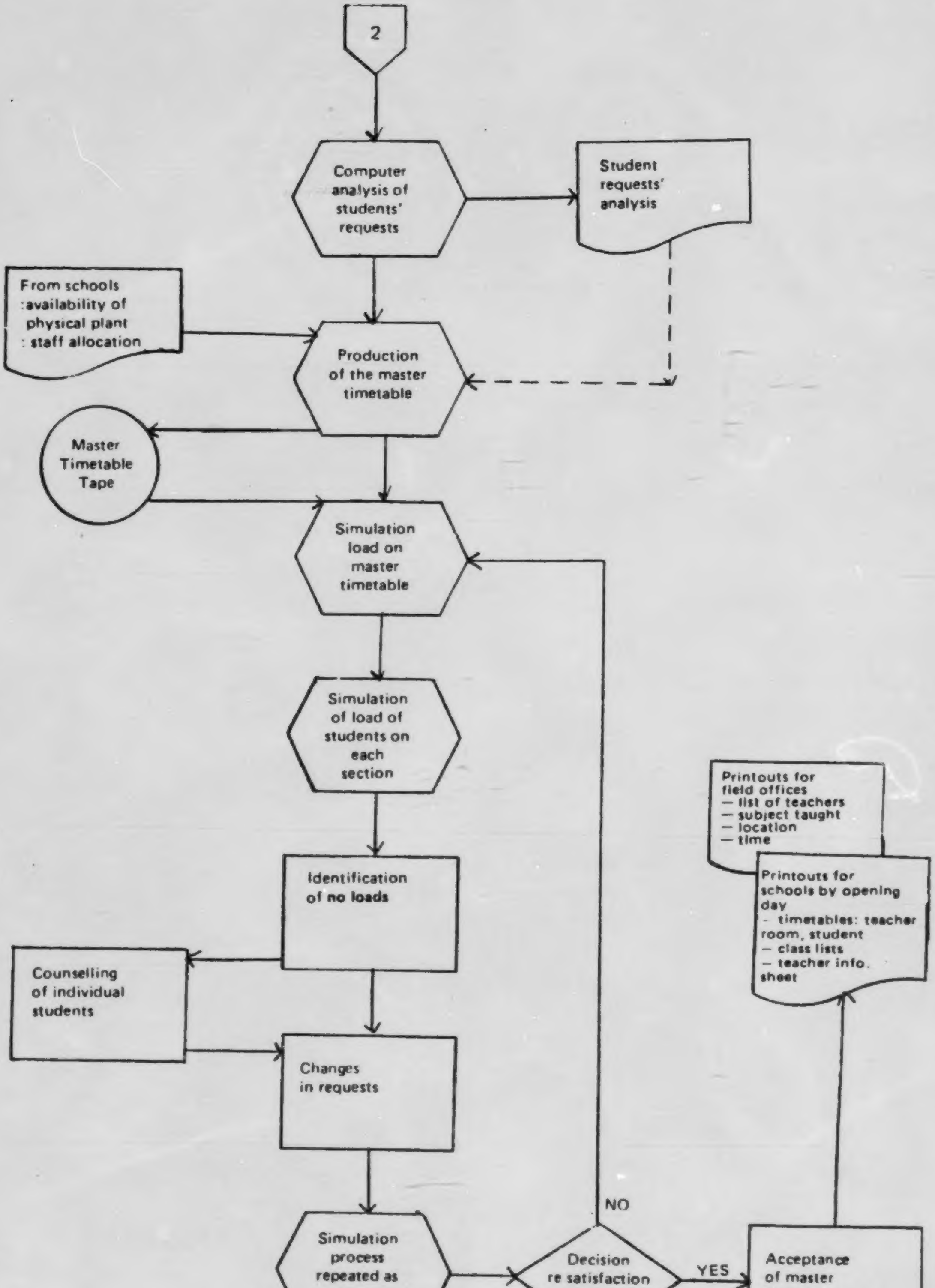

Design of draft core program
Draft core program
–guidelines
– objectives
Establishment of expectations
Report of supt. program
Statement report of expectations re: evaluation
Questionnaire results
– parents, teacher prin., v.p., consultants
Selection of evaluation criteria
Selected standardized student tests
Selected board designed student tests
Selection of random sample of students by grade, age, etc.
Attitude survey
– teachers
– principals
– community
– students
– parents
Administration of selected tests to random sample(s)
Results of board and standardized tests
Results of applicable previously administered tests
Analysis of test results current and past
2

9.1.3 (cont'd)

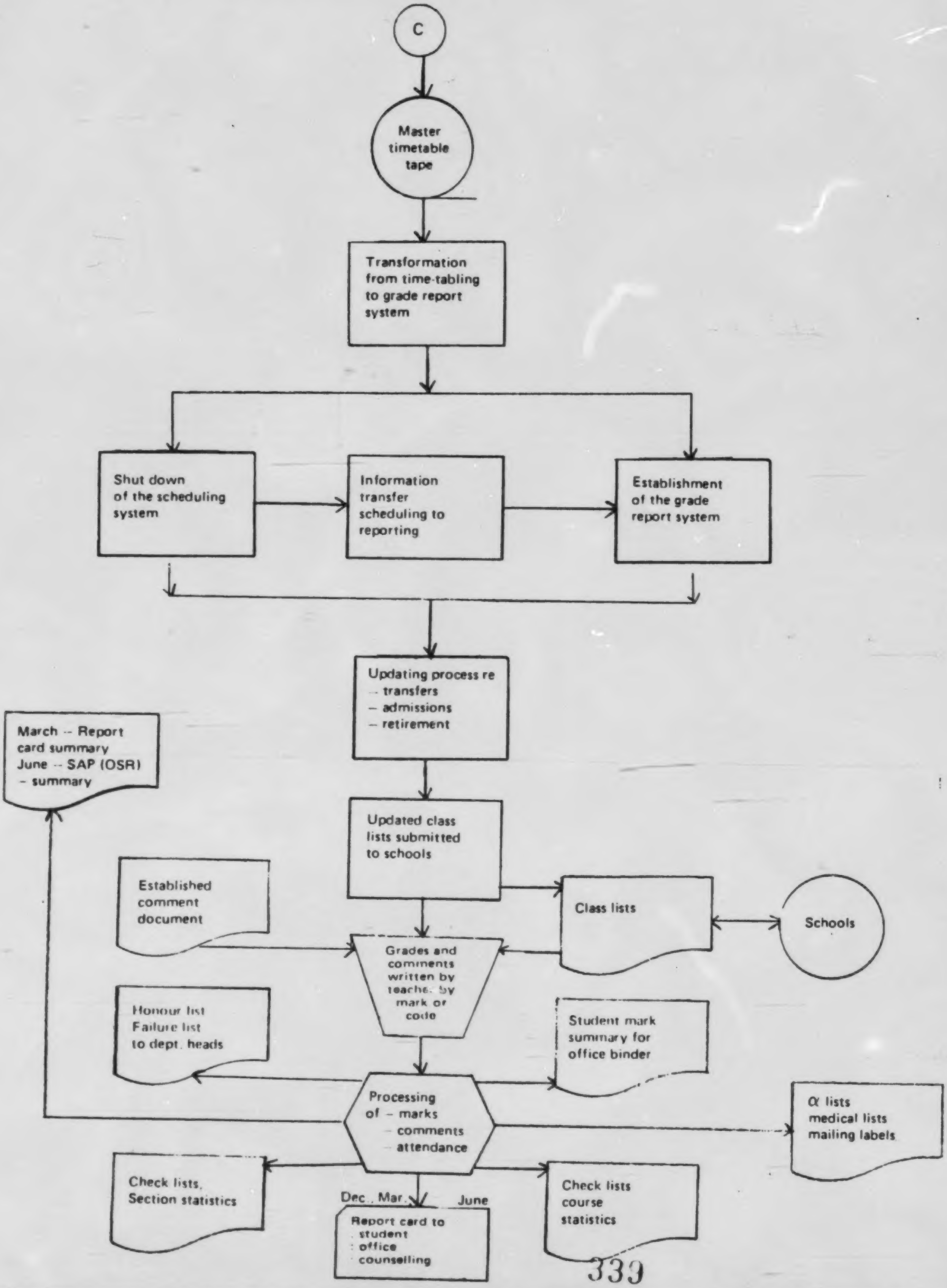

2
Implementation of core program
Standardized and board tests
Cross-sectional survey of same grade cohort until longitudinal study finished
Longitudinal survey of same random sample on an annual basis to end of Gr. 8
Test results
Analysis of test results
Analysis of test results
Information surveys
– community
– staff
– students
Report and recommendations

9.2 1 SCHOOL CURRICULUM (PROGRAM): Operations – Timetabling


Existing Ministry of Education time tabling process
Program developed by G.E.A.C.
Preparation of timetable schedules at Ministry of Education
NO
Decision to process at board
YES
Development of computer program for time table scheduling
Staff recommendations
Student Information Sheet
Development of forms re: student courses teachers
Student scheduling Teacher/Course Master
Dissemination of forms to the schools
Receipt of completed forms
Preparation of Form Information for Computer Input
Registration of students
Tally of number of students requesting each subtest
Cross-referencing of subjects (Conflict Matrix)
Calculation of teachers required for assignment
2

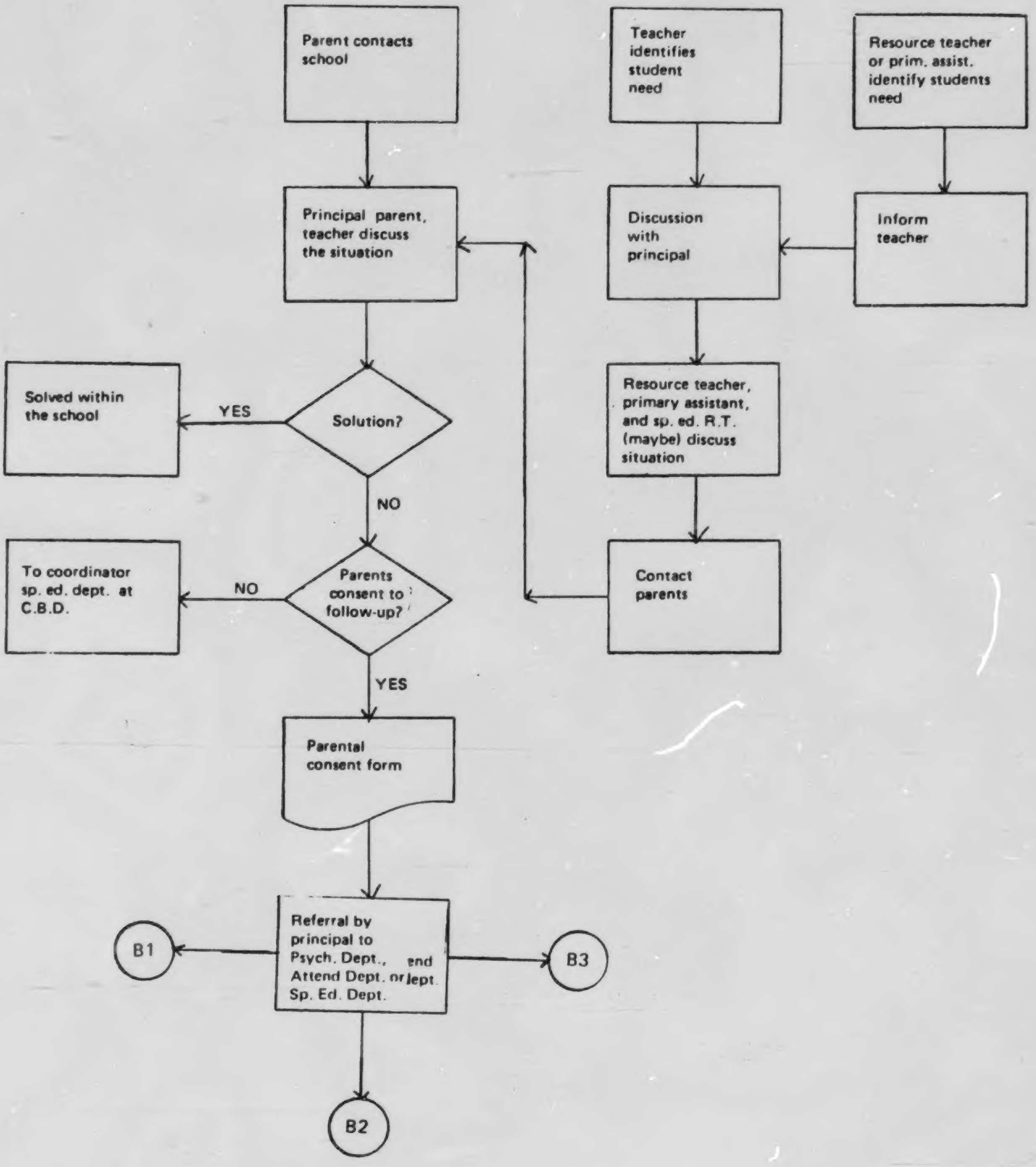

2
Computer analysis of students' requests
Student requests' analysis
From schools :availability of physical plant : staff allocation
Production of the master timetable
Master Timetable Tape
Simulation load on master timetable
Simulation of load of students on each section
Identification of no loads
Counselling of individual students
Changes in requests
Simulation process repeated as necessary
Decision re satisfaction
NO
YES
Acceptance of master timetable
Printouts for field offices
— list of teachers
— subject taught
— location
— time
Printouts for schools by opening day
- timetables: teacher room, student
— class lists
— teacher info. sheet
C

9.2.2 SCHOOL CURRICULUM (PROGRAM): Operations – Grade Reporting

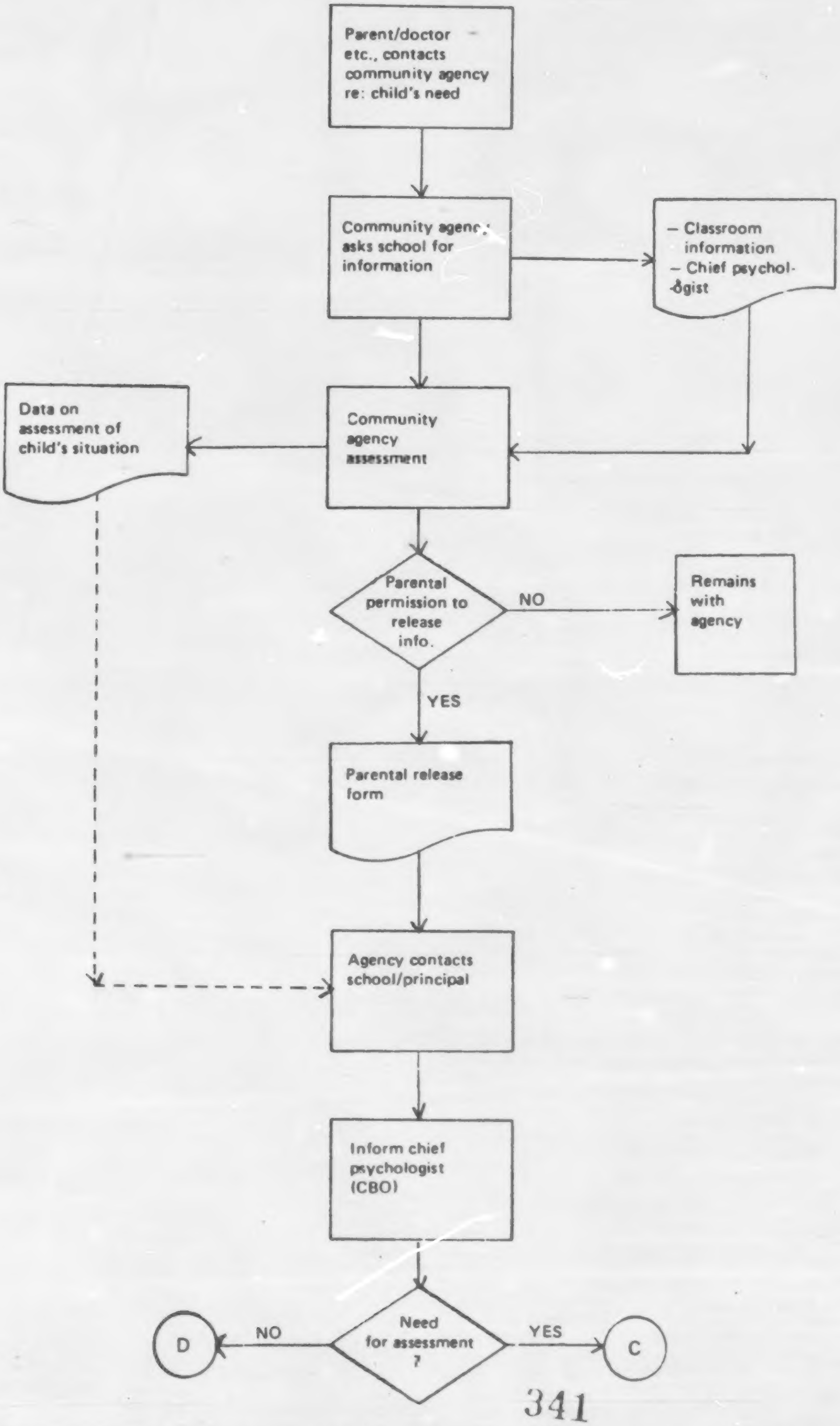

C
Master timetable tape
Transformation from time-tabling to grade report system
Shut down of the scheduling system
Information transfer scheduling to reporting
Establishment of the grade report system
Updating process re
– transfers
– admissions
– retirement
March -- Report card summary
June -- SAP (OSR) – summary
Updated class lists submitted to schools
Established comment document
Class lists
Schools
Grades and comments written by teacher by mark or code
Honour list
Failure list
to dept. heads
Student mark summary for office binder
Processing of – marks
– comments
– attendance
α lists
medical lists
mailing labels
Check lists,
Section statistics
Dec., Mar.
June
Report card to
. student
: office
: counselling
Check lists
course
statistics

10.1.1.1 SPECIAL STUDENT SERVICES: Identification of Student Need

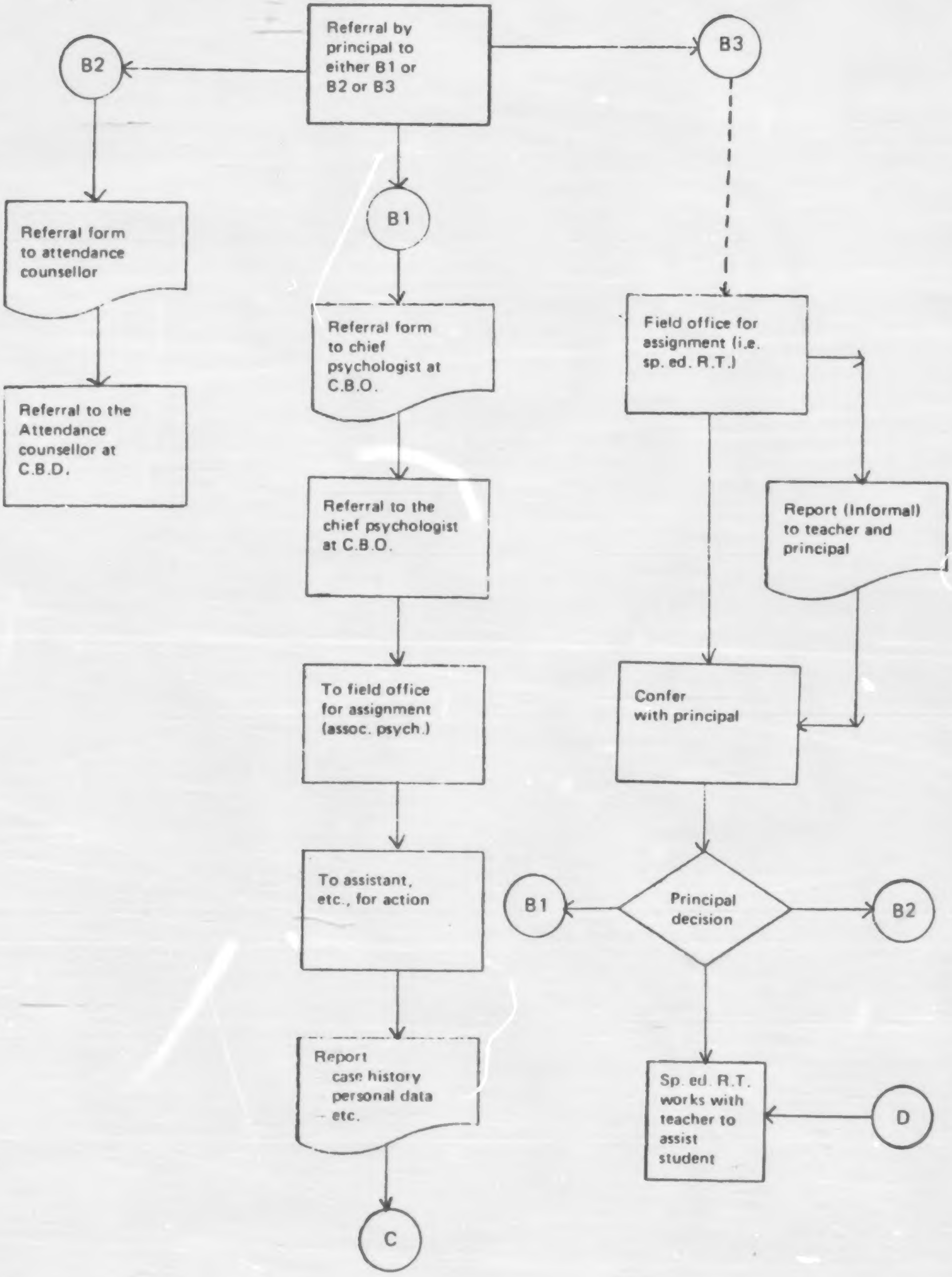
a) INTERNAL


Parent contacts school
Teacher identifies student need
Resource teacher or prim. assist. identify students need
Principal parent, teacher discuss the situation
Discussion with principal
Inform teacher
Solved within the school
YES
Solution?
NO
Resource teacher, primary assistant, and sp. ed. R.T. (maybe) discuss situation
To coordinator sp. ed. dept. at C.B.D.
NO
Parents consent to follow-up?
Contact parents
YES
Parental consent form
Referral by principal to Psych. Dept., Attend Dept. or Sp. Ed. Dept.
end
Jept.
B1
B3
B2

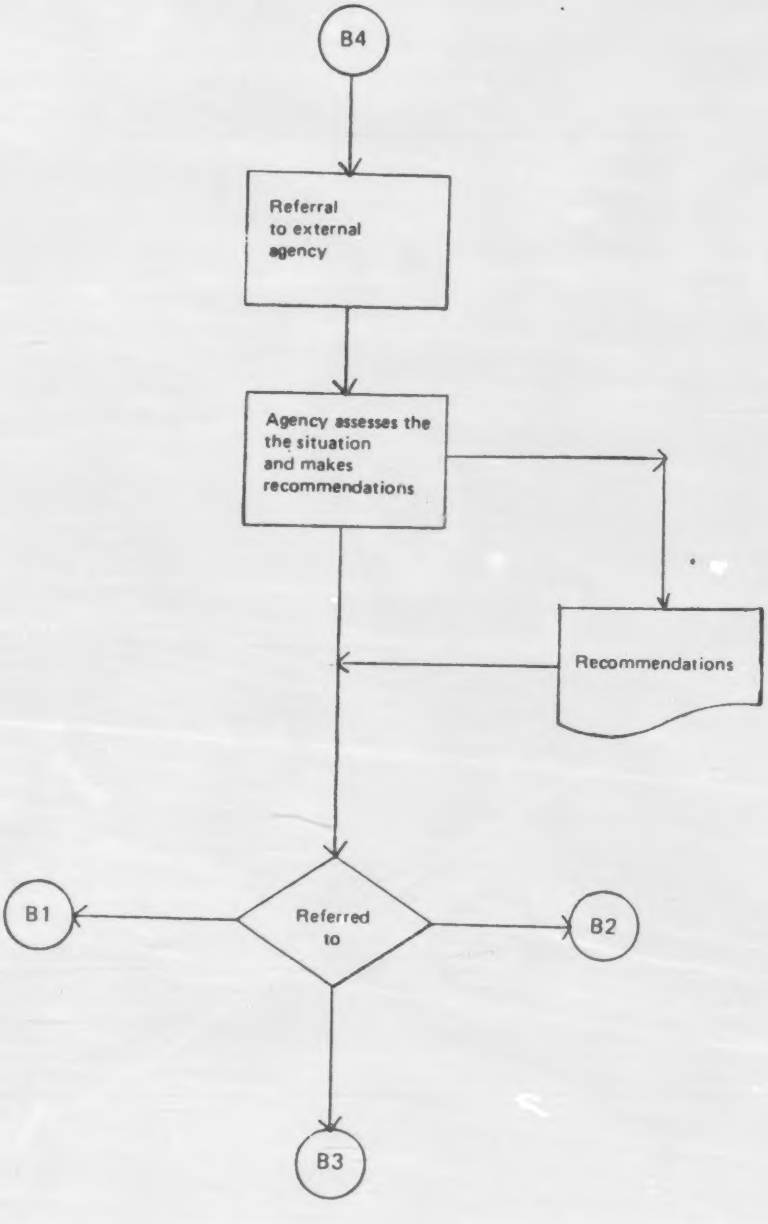
10.1.1.2 SPECIAL STUDENT SERVICES: Identification of Student Need
b) EXTERNAL


Parent/doctor etc., contacts community agency re: child's need
Community agency asks school for information
– Classroom information
– Chief psychologist
Data on assessment of child's situation
Community agency assessment
Parental permission to release info.
NO
Remains with agency
YES
Parental release form
Agency contacts school/principal
Inform chief psychologist (CBO)
Need for assessment ?
NO
D
YES
C

10.1.2.1 SPECIAL STUDENT SERVICES: Assessment of Student
a) Internal

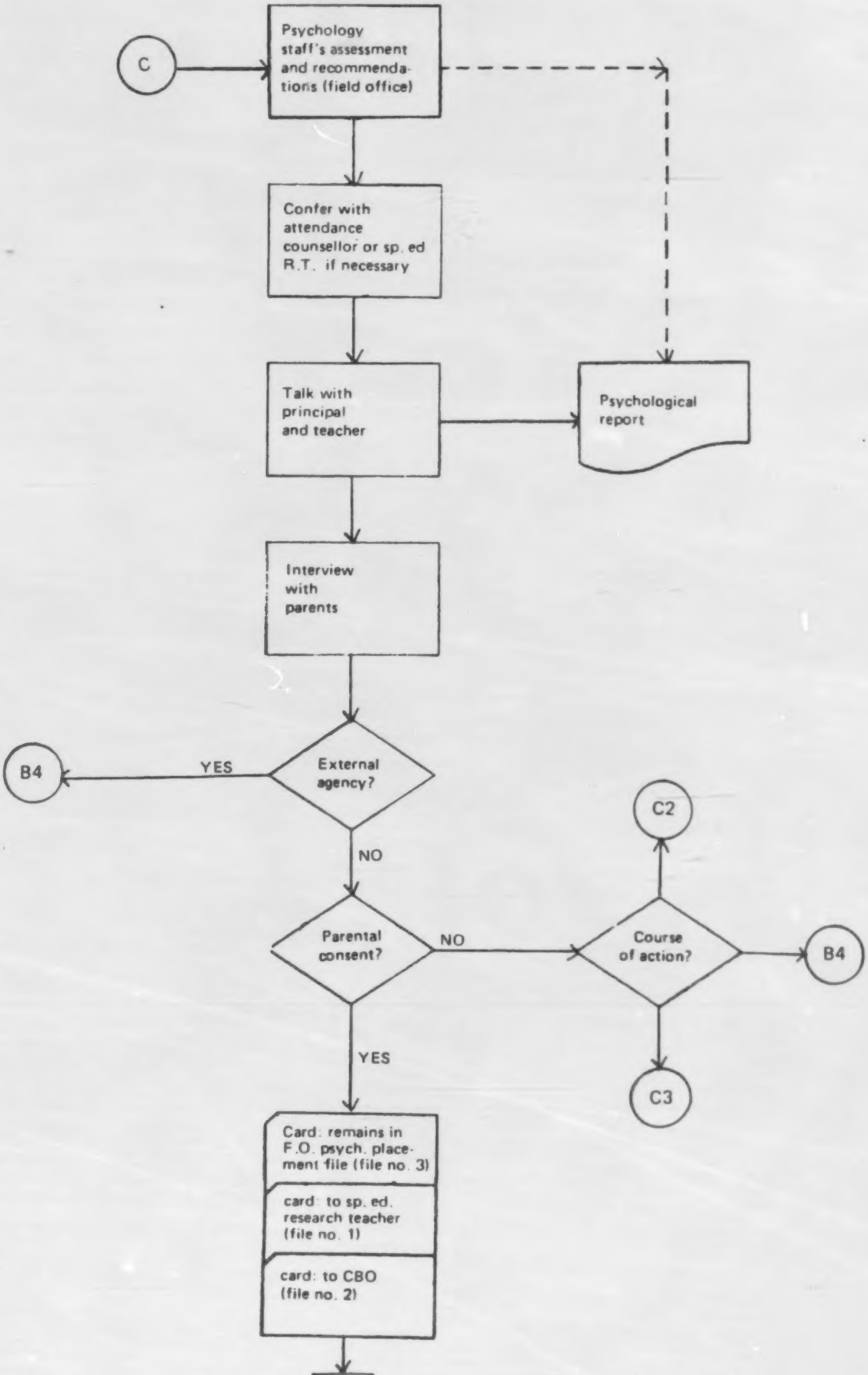

Referral by principal to either B1 or B2 or B3
B2
B3
B1
Referral form to attendance counsellor
Referral to the Attendance counsellor at C.B.D.
Referral form to chief psychologist at C.B.O.
Referral to the chief psychologist at C.B.O.
To field office for assignment (assoc. psych.)
To assistant, etc., for action
Report case history personal data etc.
C
Field office for assignment (i.e. sp. ed. R.T.)
Report (Informal) to teacher and principal
Confer with principal
B1
Principal decision
B2
Sp. ed. R.T. works with teacher to assist student
D

10.1.2.2 SPECIAL STUDENT SERVICES: Assessment of Student (b) External


B4
Referral to external agency
Agency assesses the the situation and makes recommendations
Recommendations
Referred to
B1
B2
B3

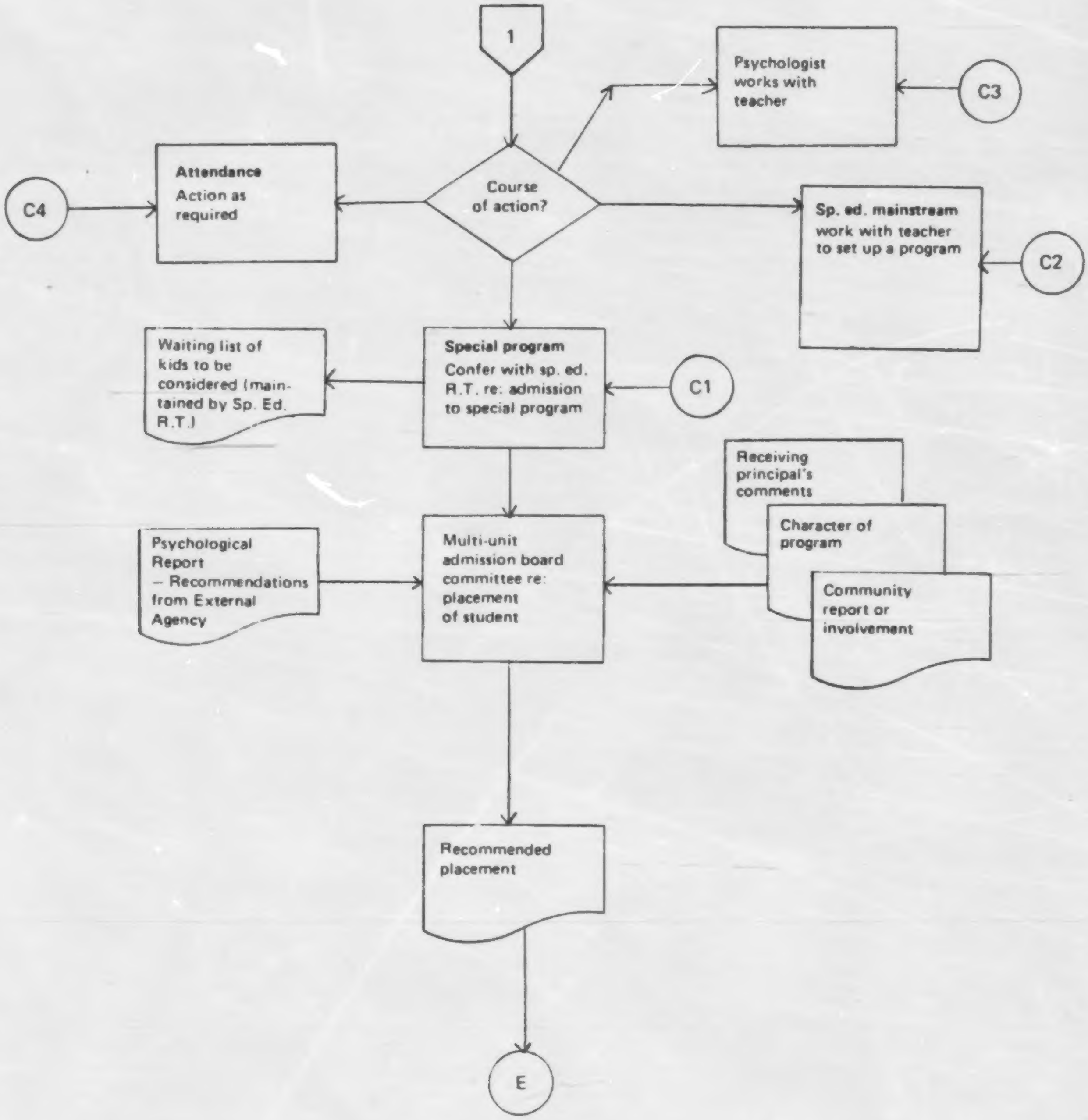
10.1.3 SPECIAL STUDENT SERVICES: Decision on Course of Action

1 of 2


C
Psychology staff's assessment and recommendations (field office)
Confer with attendance counsellor or sp. ed R.T. if necessary
Talk with principal and teacher
Psychological report
Interview with parents
External agency?
YES
B4
NO
Parental consent?
NO
Course of action?
C2
B4
C3
YES
Card: remains in F.O. psych. placement file (file no. 3)
card: to sp. ed. research teacher (file no. 1)
card: to CBO (file no. 2)
1

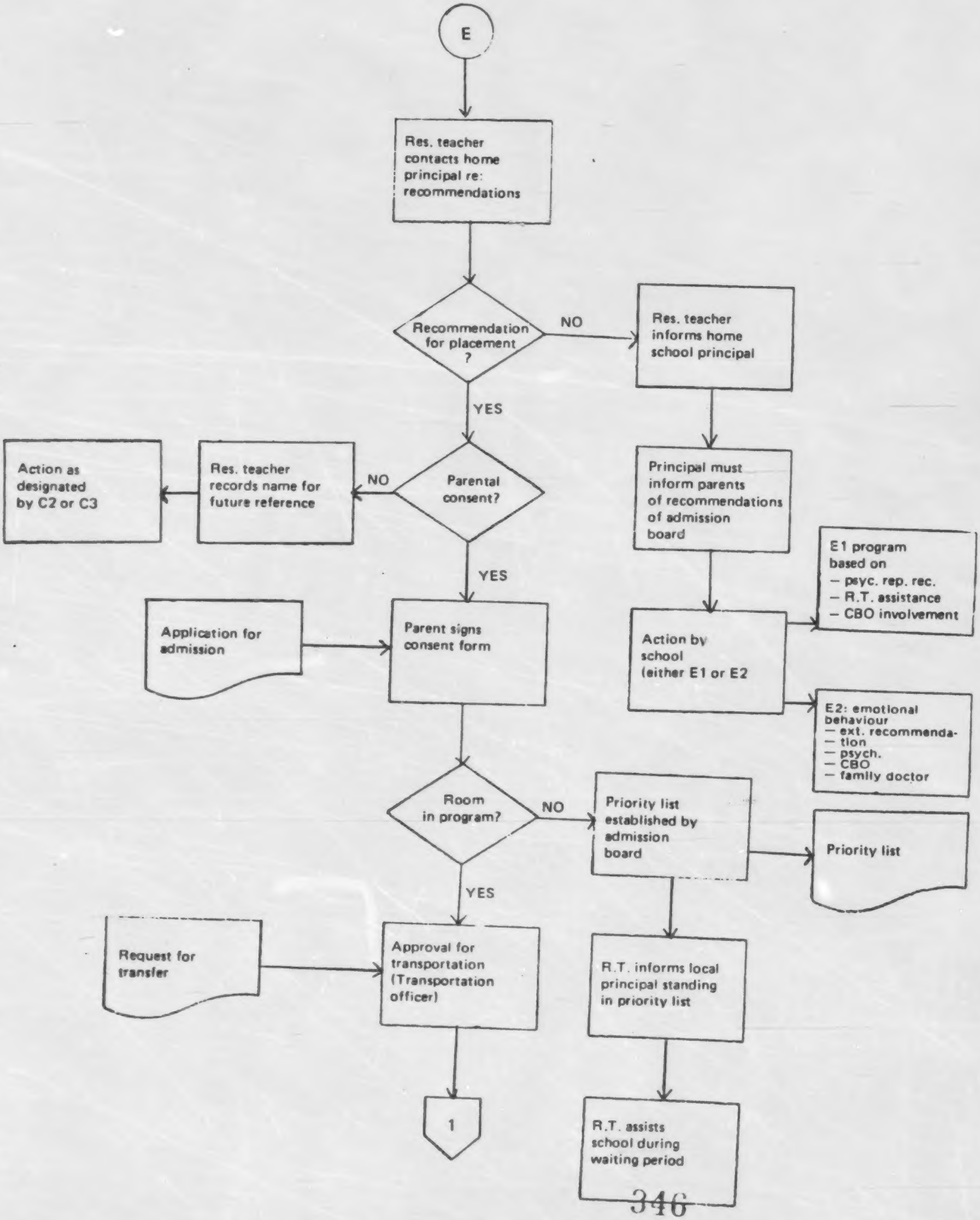
10.1.3 (cont'd)

2 of 2


1
Psychologist works with teacher
C3
C4
Attendance Action as required
Course of action?
Sp. ed. mainstream work with teacher to set up a program
C2
Waiting list of kids to be considered (maintained by Sp. Ed. R.T.)
Special program Confer with sp. ed. R.T. re: admission to special program
C1
Receiving principal's comments
Character of program
Community report or involvement
Psychological Report – Recommendations from External Agency
Multi-unit admission board committee re: placement of student
Recommended placement
E

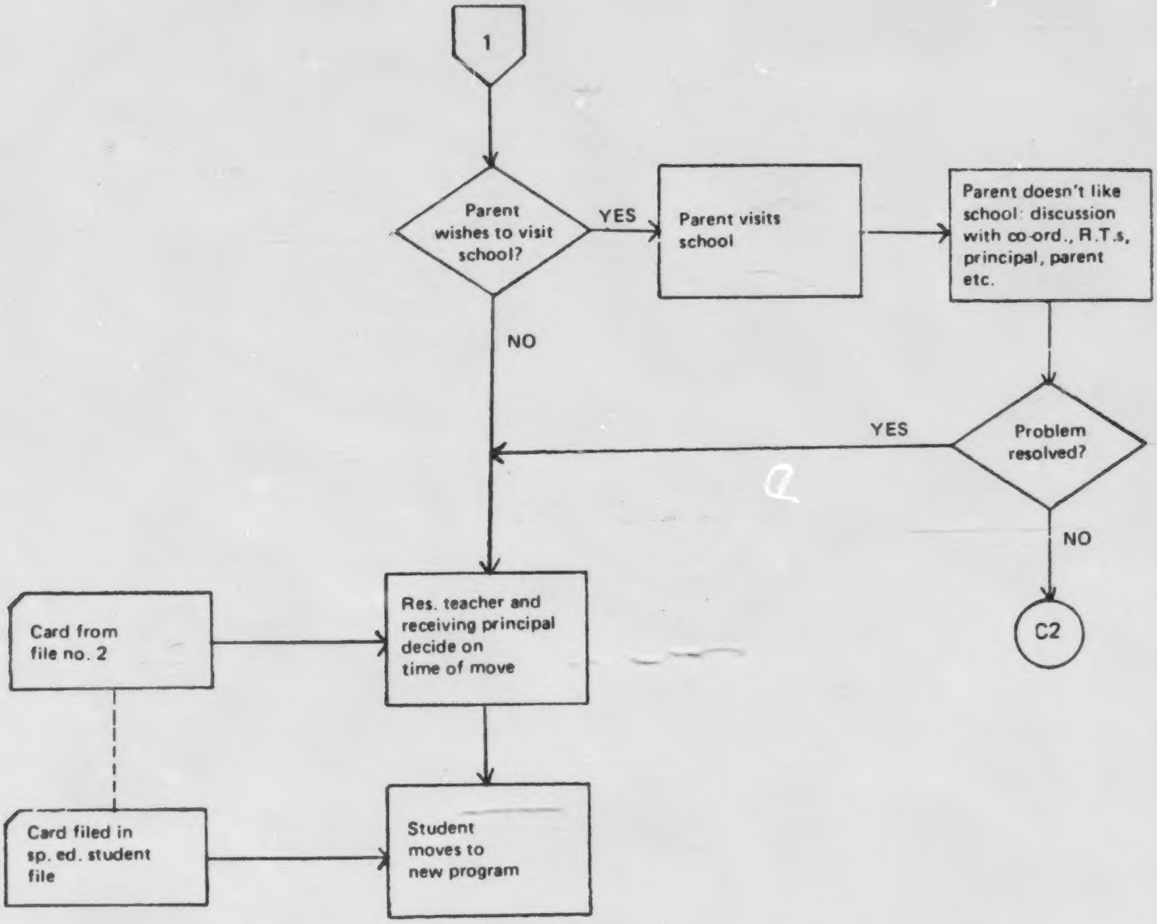
10.1.4 SPECIAL STUDENT SERVICES: Placement

1 of 2


E
Res. teacher contacts home principal re: recommendations
Recommendation for placement ?
NO
Res. teacher informs home school principal
YES
Principal must inform parents of recommendations of admission board
Action as designated by C2 or C3
Res. teacher records name for future reference
NO
Parental consent?
YES
E1 program based on
— psyc. rep. rec.
— R.T. assistance
— CBO involvement
Application for admission
Parent signs consent form
Action by school (either E1 or E2
E2: emotional behaviour
— ext. recommenda-
— tion
— psych.
— CBO
— family doctor
Room in program?
NO
Priority list established by admission board
Priority list
YES
Request for transfer
Approval for transportation (Transportation officer)
R.T. informs local principal standing in priority list
1
R.T. assists school during waiting period

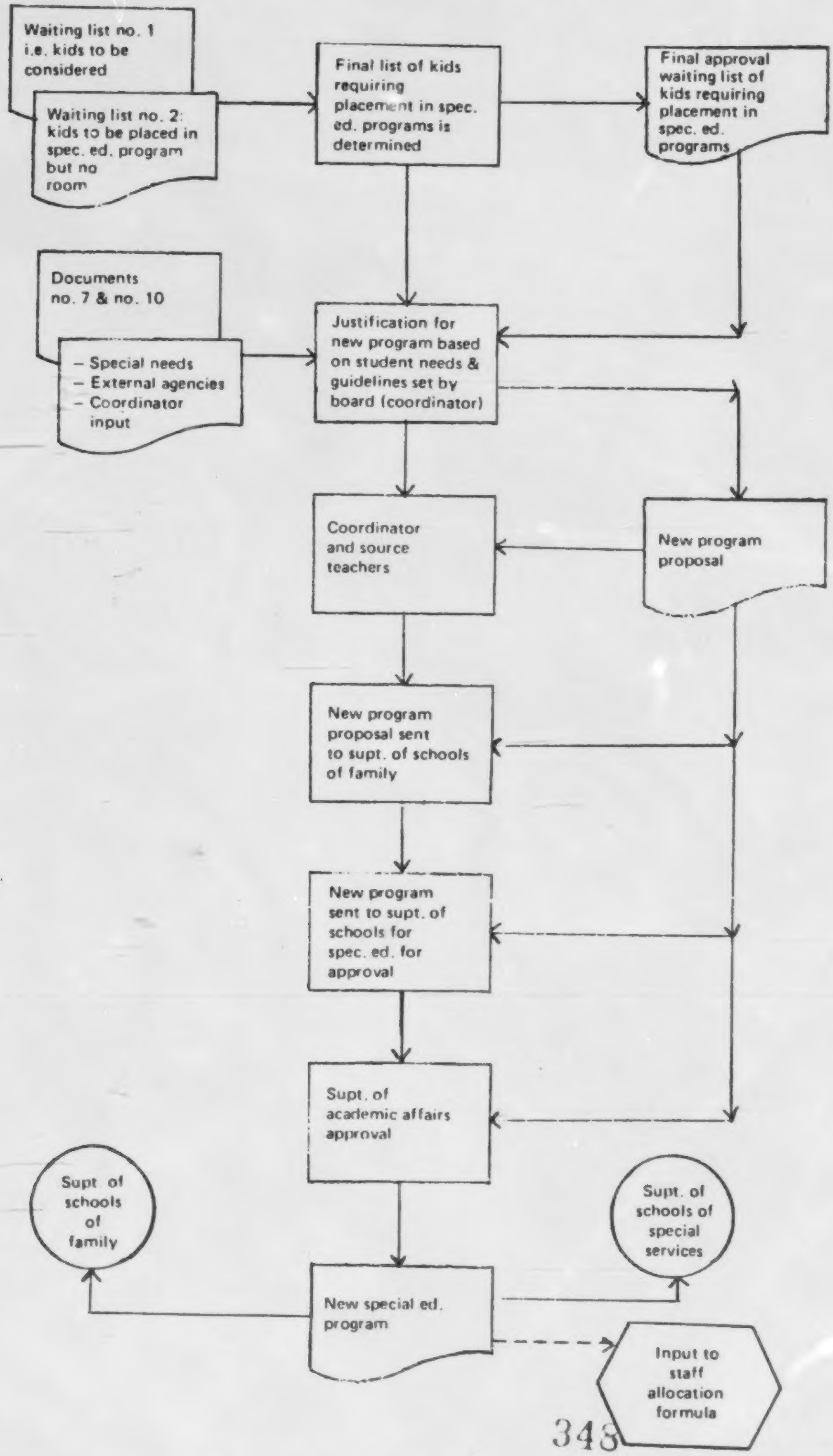
10.1.4 (cont'd)

2 of 2

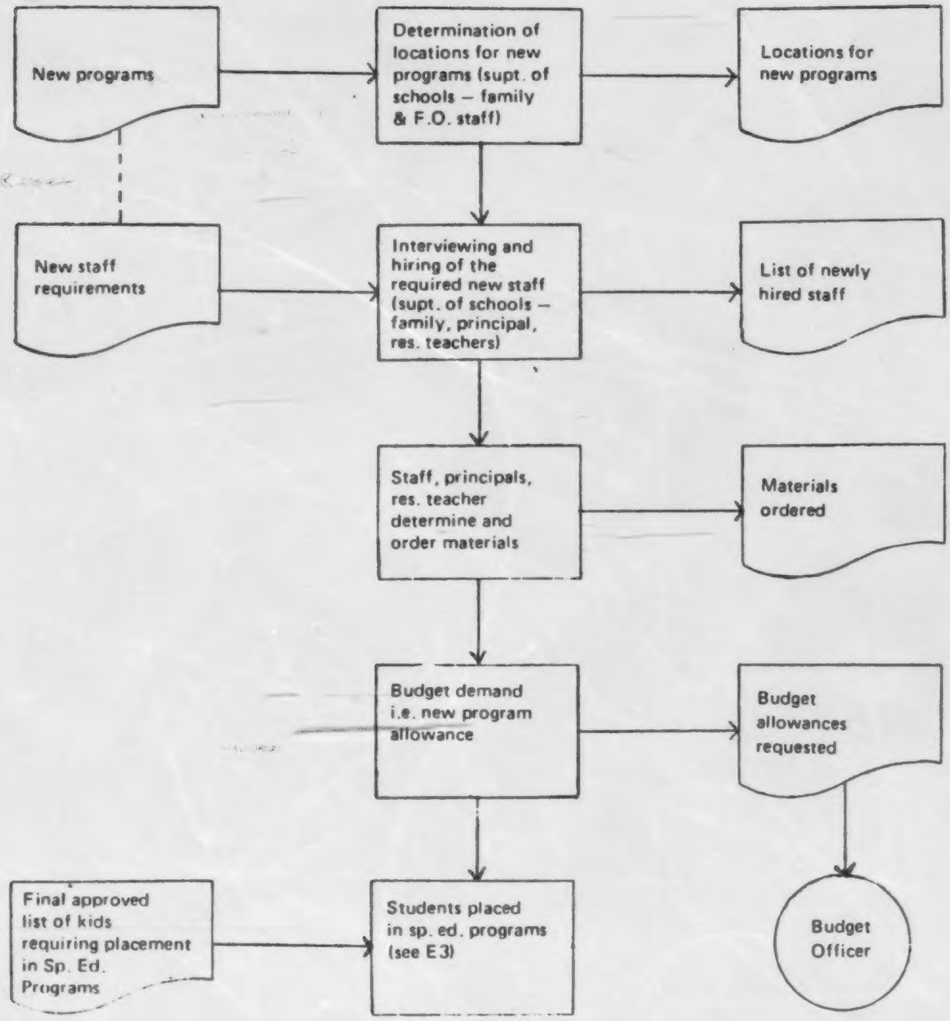

1
Parent wishes to visit school?
YES
Parent visits school
Parent doesn't like school: discussion with co-ord., R.T.s, principal, parent etc.
NO
YES
Problem resolved?
NO
C2
Card from file no. 2
Res. teacher and receiving principal decide on time of move
Card filed in sp. ed. student file
Student moves to new program

10.1.5.1 SPECIAL STUDENT SERVICES: Program Planning

a) Program Demand

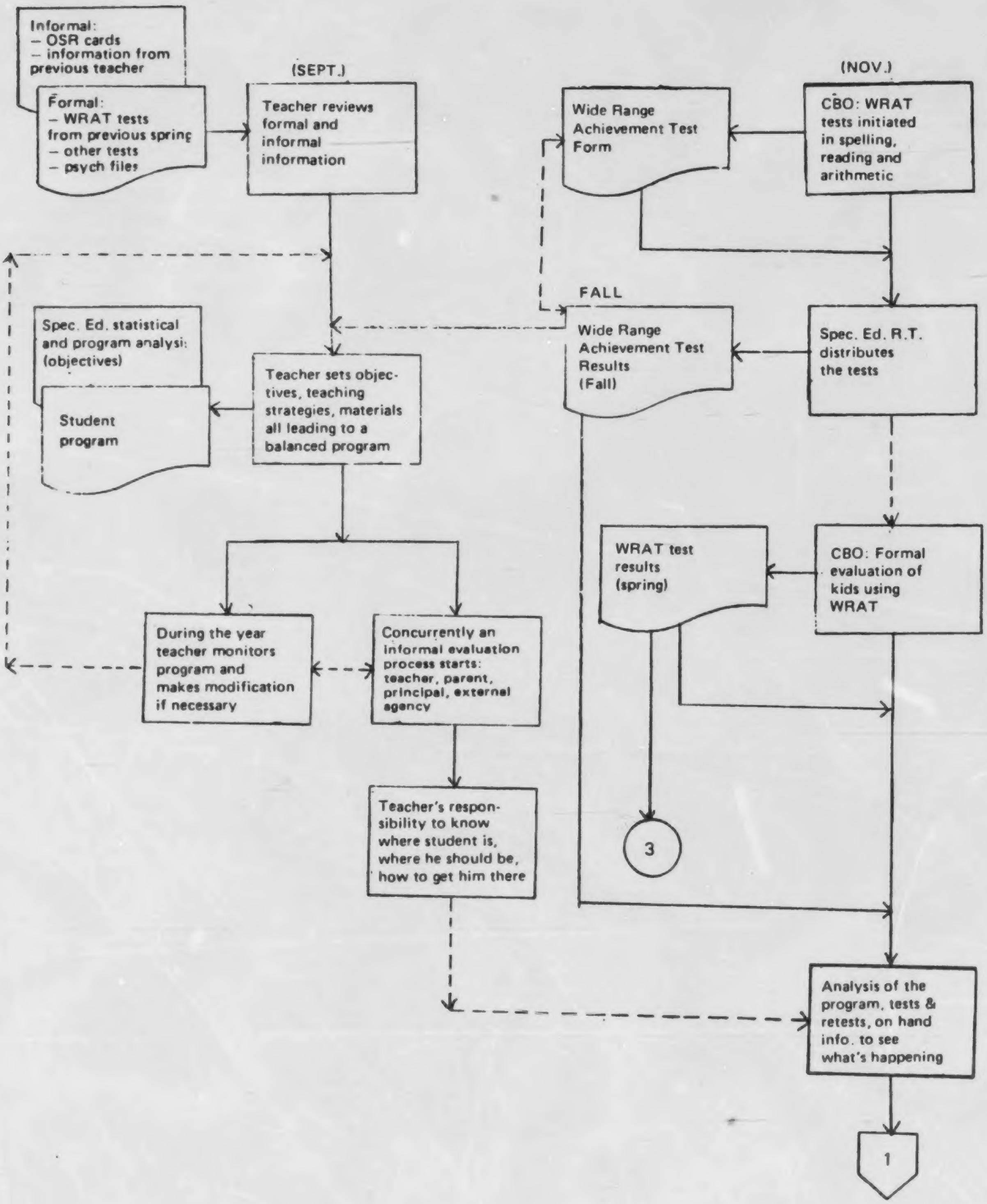

Waiting list no. 1 i.e. kids to be considered
Waiting list no. 2: kids to be placed in spec. ed. program but no room
Final list of kids requiring placement in spec. ed. programs is determined
Final approval waiting list of kids requiring placement in spec. ed. programs
Documents no. 7 & no. 10
– Special needs
– External agencies
– Coordinator input
Justification for new program based on student needs & guidelines set by board (coordinator)
Coordinator and source teachers
New program proposal
New program proposal sent to supt. of schools of family
New program sent to supt. of schools for spec. ed. for approval
Supt. of academic affairs approval
Supt. of schools of family
New special ed. program
Supt. of schools of special services
Input to staff allocation formula

10.1.5.2 SPECIAL STUDENT SERVICES: Program Planning
b) Staff/Facilities/Materials/Budget Demand


New programs
Determination of locations for new programs (supt. of schools – family & F.O. staff)
Locations for new programs
New staff requirements
Interviewing and hiring of the required new staff (supt. of schools – family, principal, res. teachers)
List of newly hired staff
Staff, principals, res. teacher determine and order materials
Materials ordered
Budget demand i.e. new program allowance
Budget allowances requested
Final approved list of kids requiring placement in Sp. Ed. Programs
Students placed in sp. ed. programs (see E3)
Budget Officer

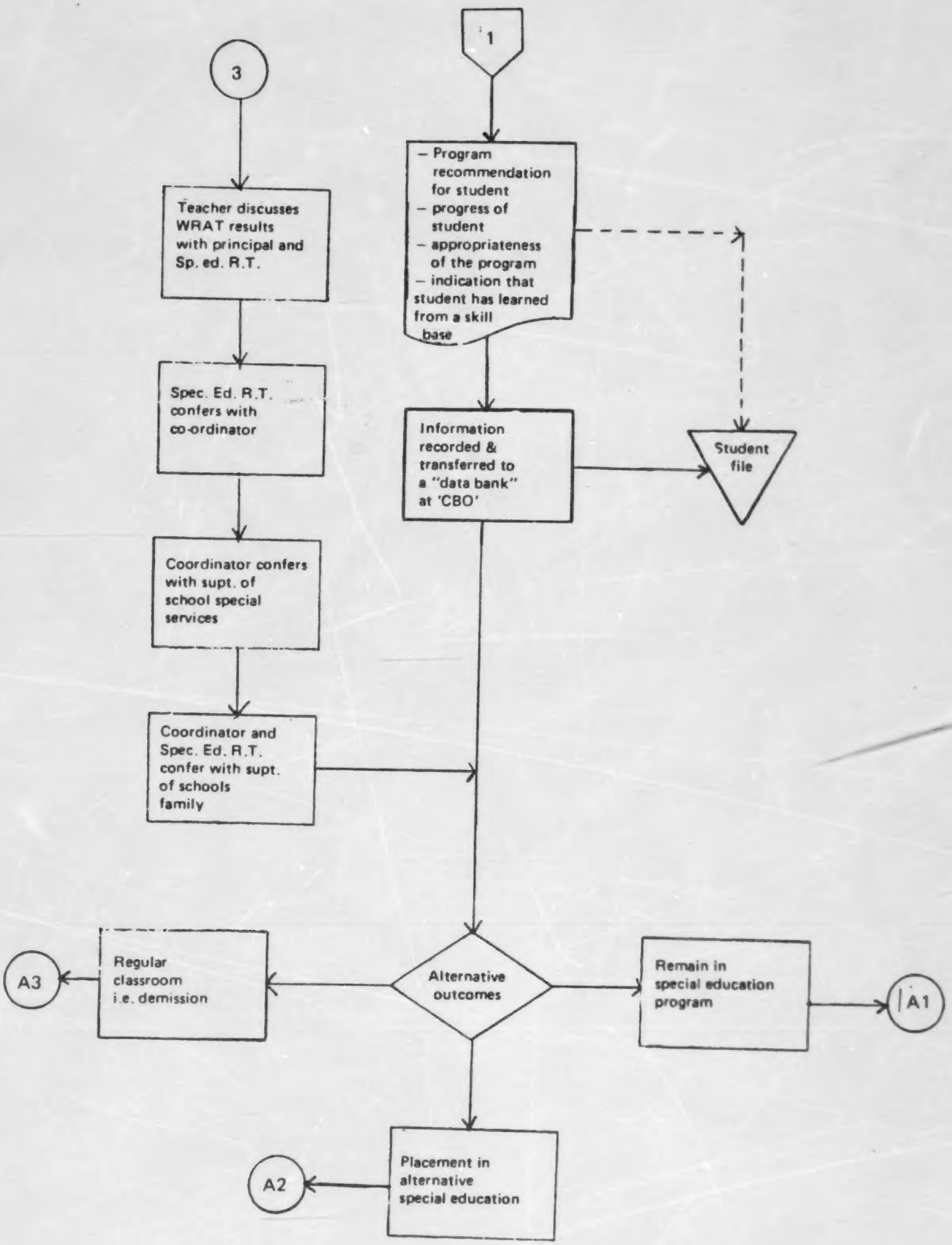
10.1.6 SPECIAL STUDENT SERVICES: On-going Evaluation

1 of 2

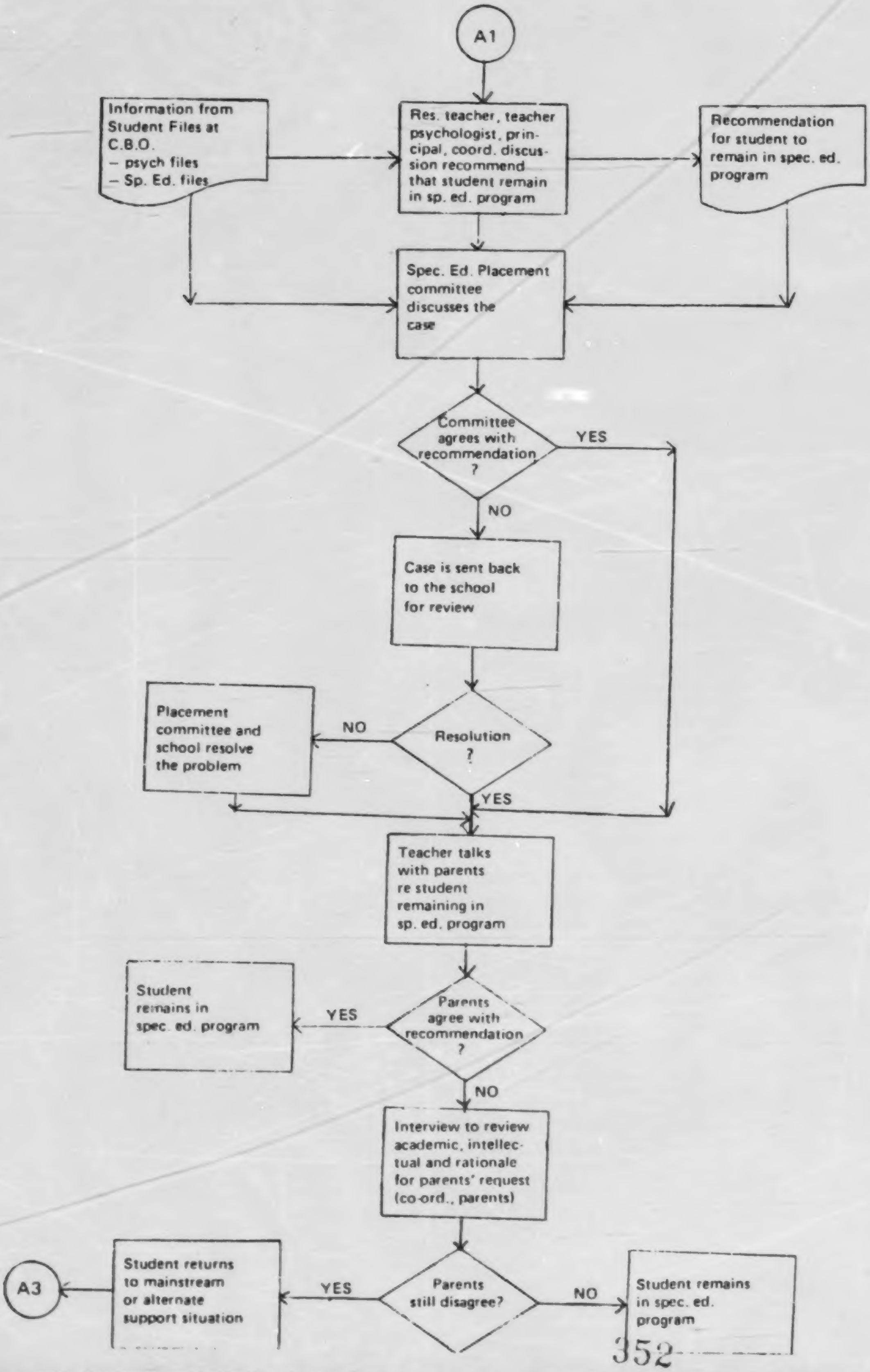

Informal:
– OSR cards
– information from previous teacher
Formal:
– WRAT tests from previous spring
– other tests
– psych files
(SEPT.)
Teacher reviews formal and informal information
(NOV.)
Wide Range Achievement Test Form
CBO: WRAT tests initiated in spelling, reading and arithmetic
FALL
Spec. Ed. statistical and program analysis (objectives)
Student program
Teacher sets objectives, teaching strategies, materials all leading to a balanced program
Wide Range Achievement Test Results (Fall)
Spec. Ed. R.T. distributes the tests
WRAT test results (spring)
CBO: Formal evaluation of kids using WRAT
During the year teacher monitors program and makes modification if necessary
Concurrently an informal evaluation process starts: teacher, parent, principal, external agency
Teacher's responsibility to know where student is, where he should be, how to get him there
3
Analysis of the program, tests & retests, on hand info. to see what's happening
1

10.1.6 (cont'd)

2 of 2

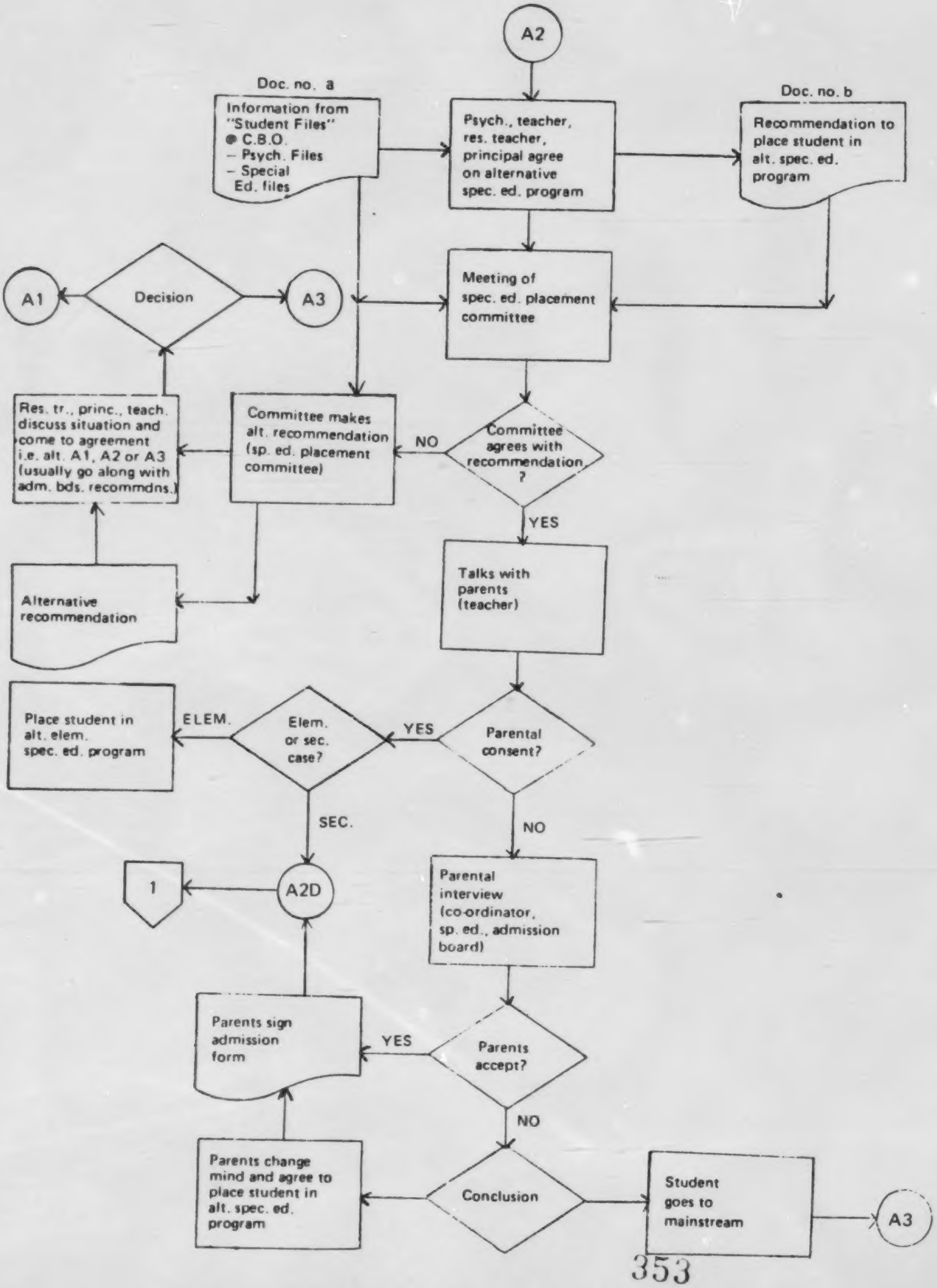

3
Teacher discusses WRAT results with principal and Sp. ed. R.T.
Spec. Ed. R.T. confers with co-ordinator
Coordinator confers with supt. of school special services
Coordinator and Spec. Ed. R.T. confer with supt. of schools family
1
– Program recommendation for student
– progress of student
– appropriateness of the program
– indication that student has learned from a skill base
Information recorded & transferred to a "data bank" at 'CBO'
Student file
Alternative outcomes
Regular classroom i.e. demission
A3
Remain in special education program
A1
Placement in alternative special education
A2

10.1.6.1 SPECIAL STUDENT SERVICES: On-going Evaluation
A1 – Remain in Special Education Program


A1
Information from Student Files at C.B.O.
– psych files
– Sp. Ed. files
Res. teacher, teacher psychologist, principal, coord. discussion recommend that student remain in sp. ed. program
Recommendation for student to remain in spec. ed. program
Spec. Ed. Placement committee discusses the case
Committee agrees with recommendation ?
YES
NO
Case is sent back to the school for review
Placement committee and school resolve the problem
NO
Resolution ?
YES
Teacher talks with parents re student remaining in sp. ed. program
Student remains in spec. ed. program
YES
Parents agree with recommendation ?
NO
Interview to review academic, intellectual and rationale for parents' request (co-ord., parents)
A3
Student returns to mainstream or alternate support situation
YES
Parents still disagree?
NO
Student remains in spec. ed. program

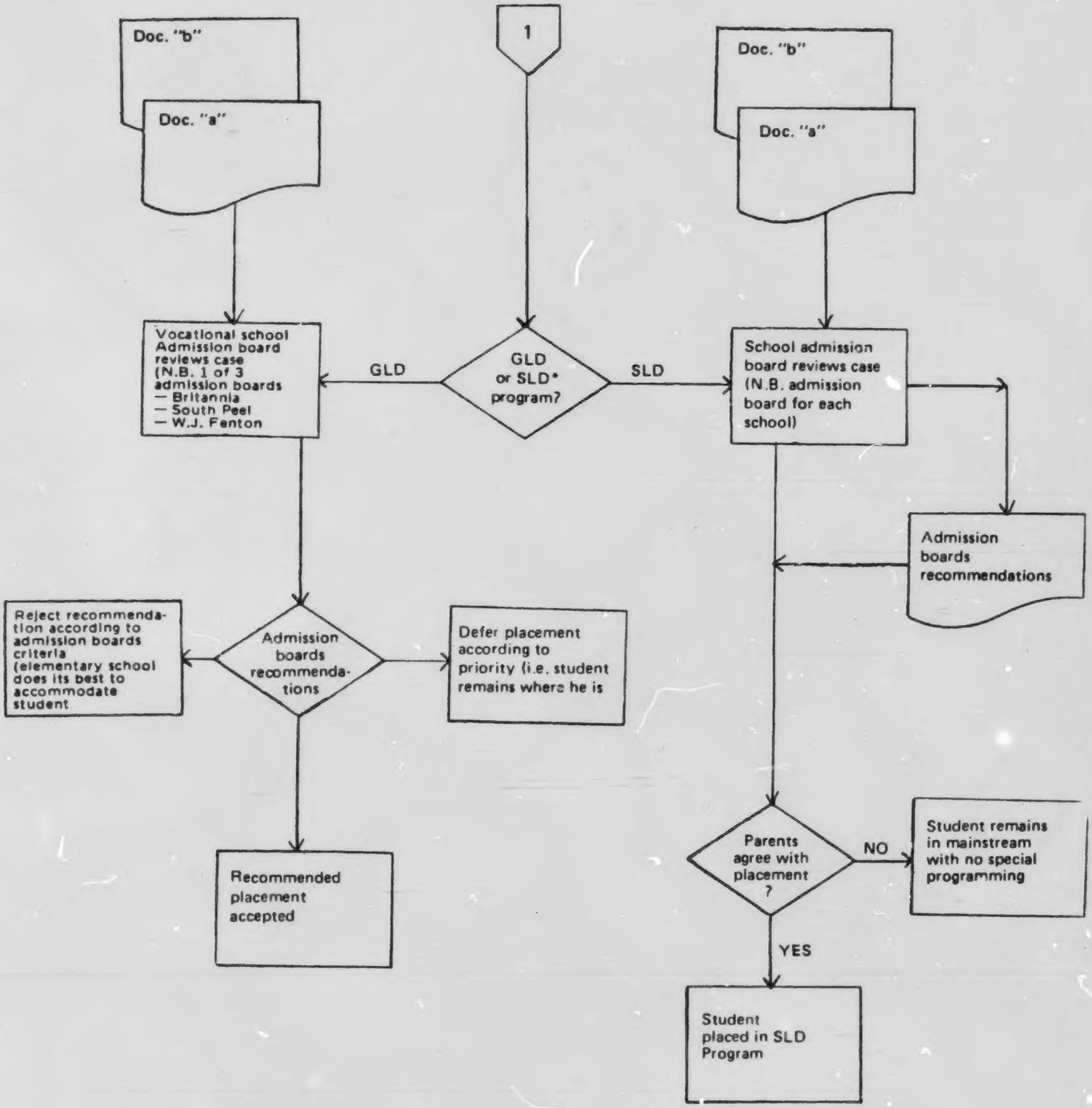
10.1.6.2 SPECIAL STUDENT SERVICES: On-going Evaluation
A2 – Alternative Special Education Program

1 of 2


A2
Doc. no. a
Information from "Student Files"
● C.B.O.
– Psych. Files
– Special Ed. files
Psych., teacher, res. teacher, principal agree on alternative spec. ed. program
Doc. no. b
Recommendation to place student in alt. spec. ed. program
A1
Decision
A3
Meeting of spec. ed. placement committee
Res. tr., princ., teach. discuss situation and come to agreement i.e. alt. A1, A2 or A3 (usually go along with adm. bds. recommdns.)
Committee makes alt. recommendation (sp. ed. placement committee)
NO
Committee agrees with recommendation ?
YES
Alternative recommendation
Talks with parents (teacher)
Place student in alt. elem. spec. ed. program
ELEM.
Elem. or sec. case?
YES
Parental consent?
SEC.
NO
1
A2D
Parental interview (co-ordinator, sp. ed., admission board)
Parents sign admission form
YES
Parents accept?
NO
Parents change mind and agree to place student in alt. spec. ed. program
Conclusion
Student goes to mainstream
A3

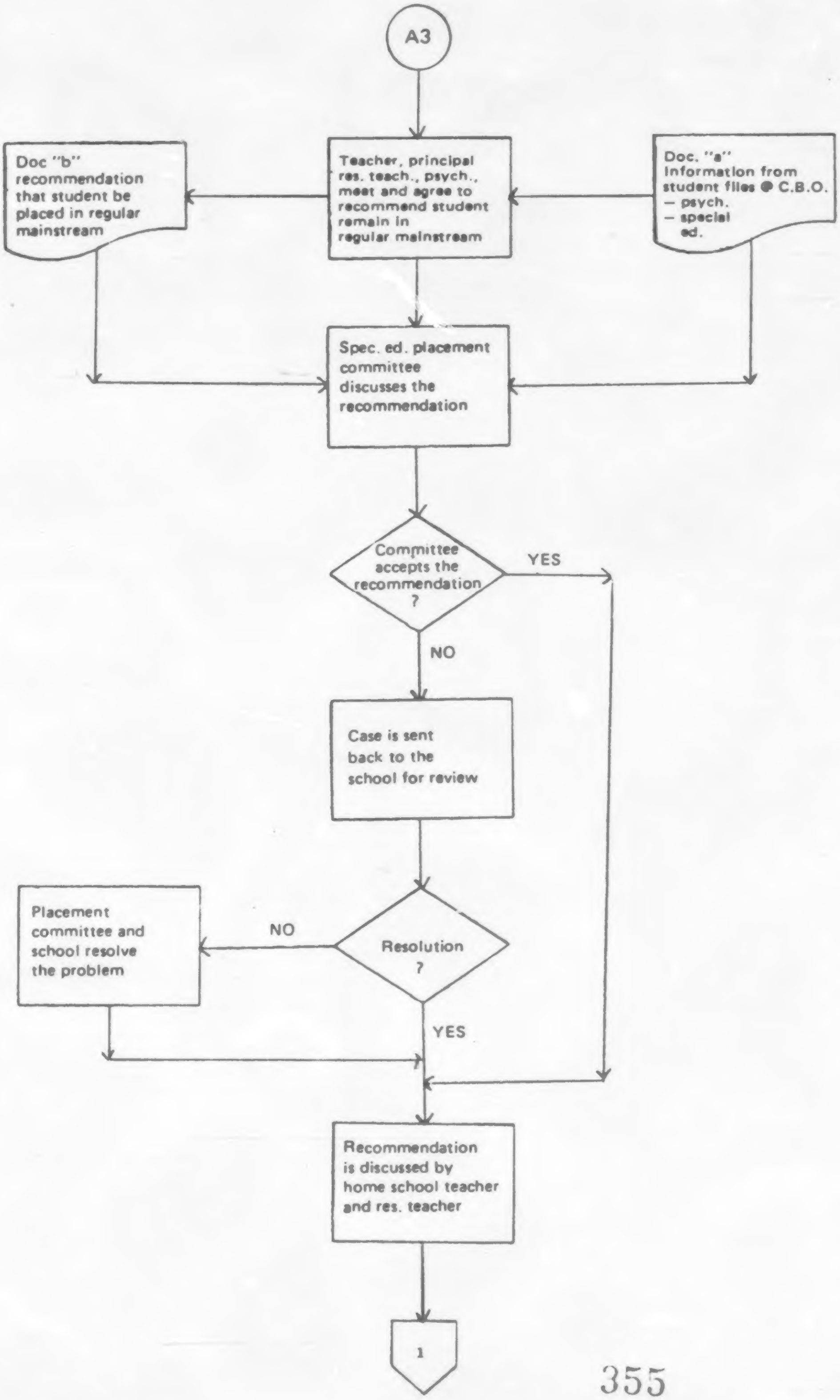
10.1.6.1 (cont'd)

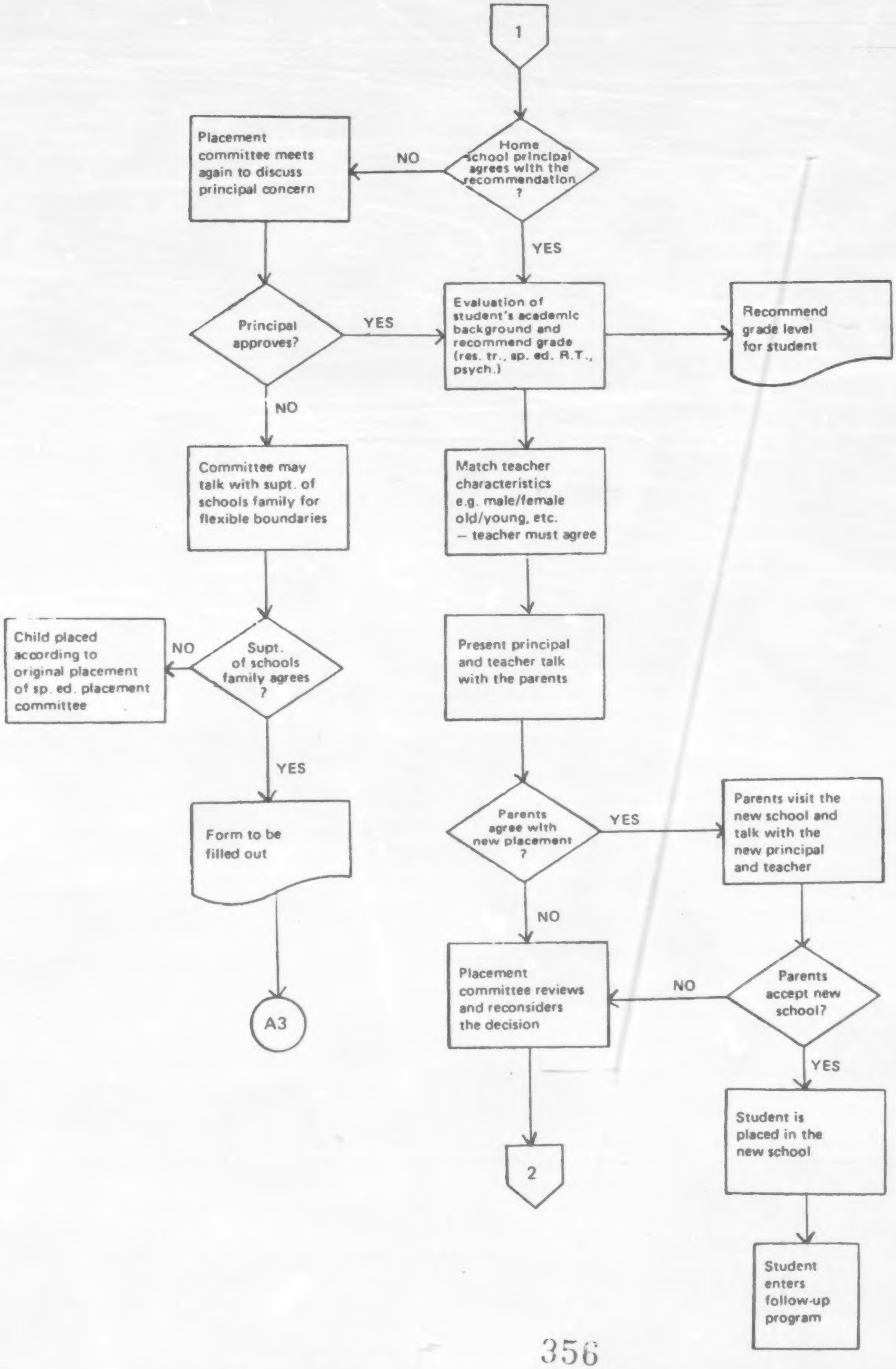
2 of 2


Doc. "b"
Doc. "a"
1
Doc. "b"
Doc. "a"
Vocational school Admission board reviews case (N.B. 1 of 3 admission boards — Britannia — South Peel — W.J. Fenton
GLD
GLD or SLD* program?
SLD
School admission board reviews case (N.B. admission board for each school)
Admission boards recommendations
Reject recommendation according to admission boards criteria (elementary school does its best to accommodate student
Admission boards recommendations
Defer placement according to priority (i.e. student remains where he is
Recommended placement accepted
Parents agree with placement ?
NO
Student remains in mainstream with no special programming
YES
Student placed in SLD Program

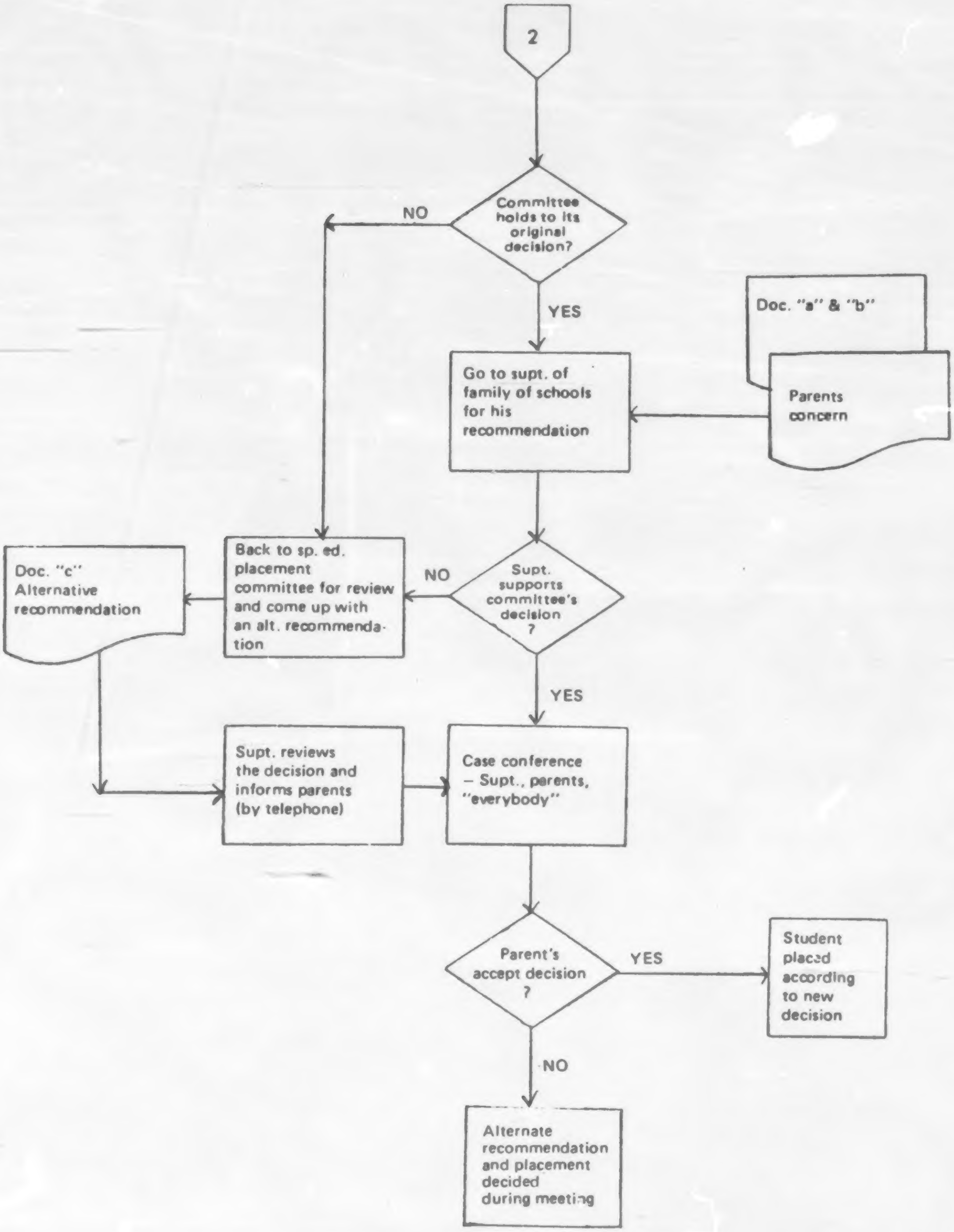
*GLD – General Learning Disability
SLD – Special Learning Disability

10.1.6.3 SPECIAL STUDENT SERVICES: On-going Evaluation
A3 — Regular Mainstream

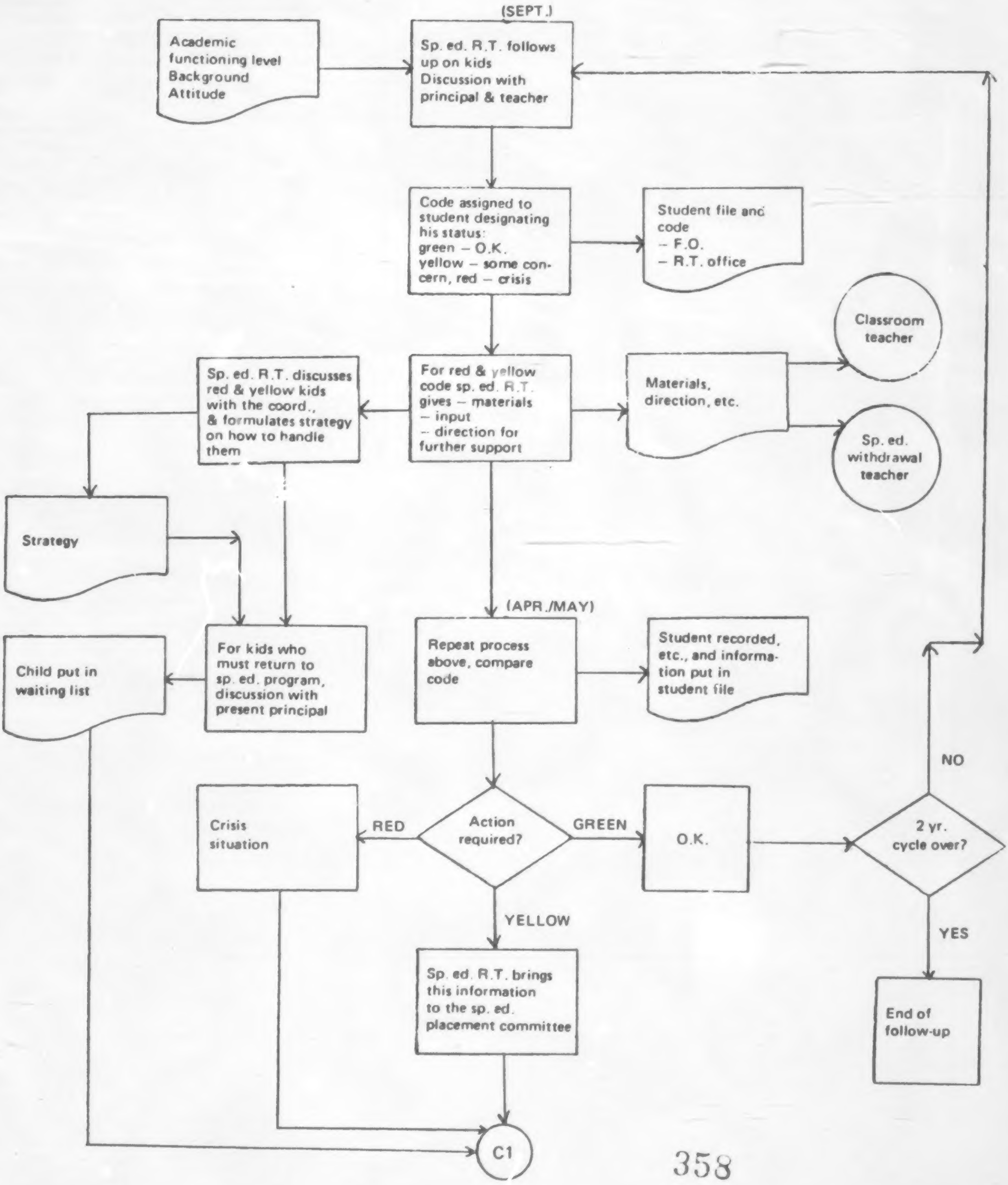

A3
Doc "b" recommendation that student be placed in regular mainstream
Teacher, principal res. teach., psych., meet and agree to recommend student remain in regular mainstream
Doc. "a" Information from student files @ C.B.O. — psych. — special ed.
Spec. ed. placement committee discusses the recommendation
Committee accepts the recommendation ?
YES
NO
Case is sent back to the school for review
Placement committee and school resolve the problem
NO
Resolution ?
YES
Recommendation is discussed by home school teacher and res. teacher
1


1
Home school principal agrees with the recommendation ?
NO
Placement committee meets again to discuss principal concern
YES
Principal approves?
YES
Evaluation of student's academic background and recommend grade (res. tr., sp. ed. R.T., psych.)
Recommend grade level for student
NO
Committee may talk with supt. of schools family for flexible boundaries
Match teacher characteristics e.g. male/female old/young, etc. – teacher must agree
Child placed according to original placement of sp. ed. placement committee
NO
Supt. of schools family agrees ?
Present principal and teacher talk with the parents
YES
Form to be filled out
Parents agree with new placement ?
YES
Parents visit the new school and talk with the new principal and teacher
NO
Placement committee reviews and reconsiders the decision
NO
Parents accept new school?
A3
YES
Student is placed in the new school
2
Student enters follow-up program

10.1.6.3 (cont'd)

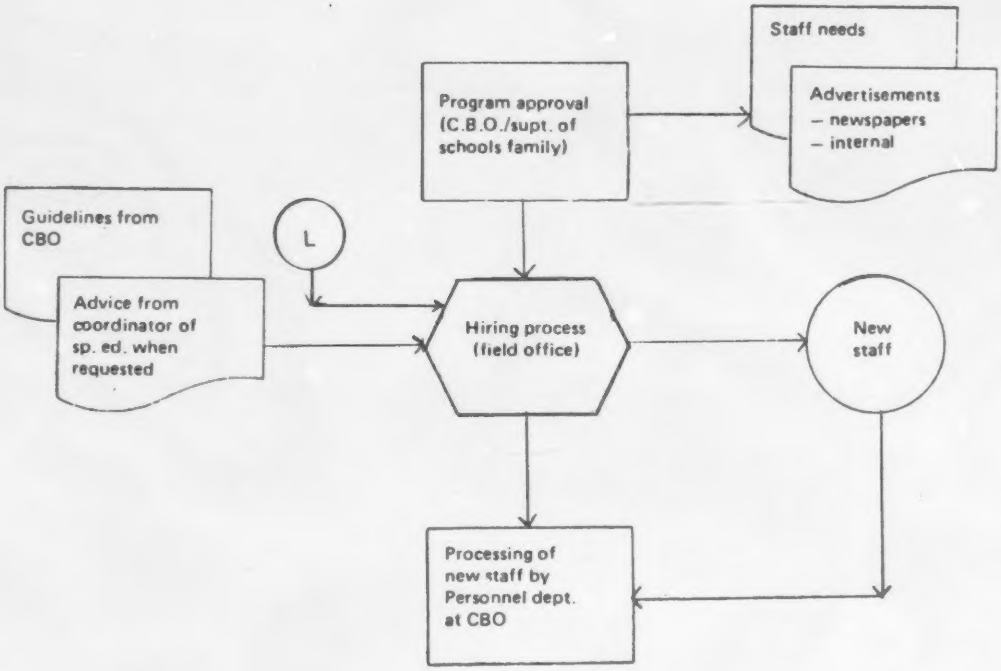

2
Committee holds to its original decision?
NO
YES
Doc. "a" & "b"
Parents concern
Go to supt. of family of schools for his recommendation
Supt. supports committee's decision ?
NO
Back to sp. ed. placement committee for review and come up with an alt. recommendation
Doc. "c" Alternative recommendation
YES
Supt. reviews the decision and informs parents (by telephone)
Case conference – Supt., parents, "everybody"
Parent's accept decision ?
YES
Student placed according to new decision
NO
Alternate recommendation and placement decided during meeting

10.1.7 SPECIAL STUDENT SERVICES: Monitoring of Student's Progress after Leaving Special Education Program

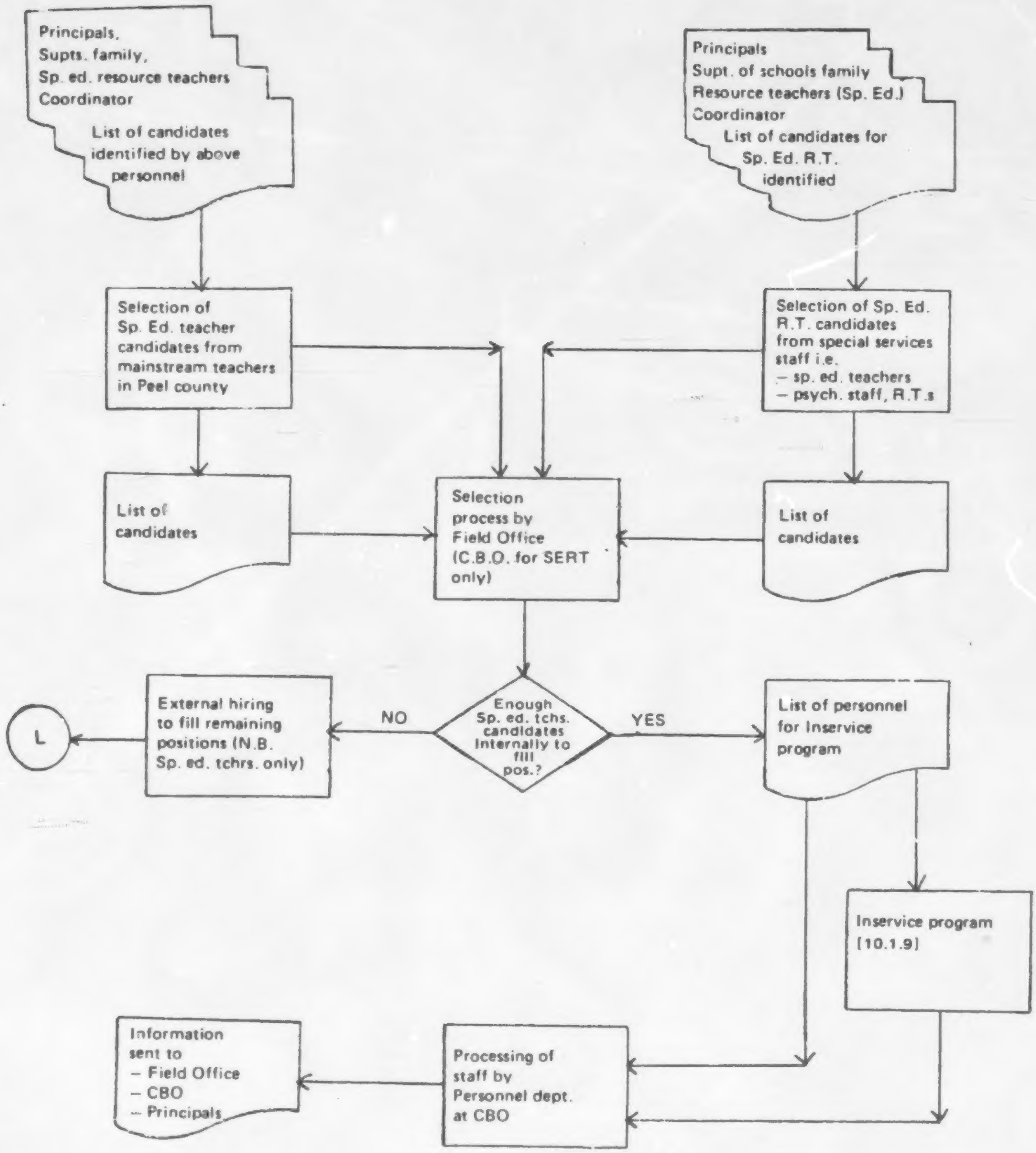

(SEPT.)
Academic functioning level Background Attitude
Sp. ed. R.T. follows up on kids Discussion with principal & teacher
Code assigned to student designating his status: green – O.K. yellow – some concern, red – crisis
Student file and code – F.O. – R.T. office
Classroom teacher
For red & yellow code sp. ed. R.T. gives – materials – input – direction for further support
Materials, direction, etc.
Sp. ed. withdrawal teacher
Sp. ed. R.T. discusses red & yellow kids with the coord., & formulates strategy on how to handle them
Strategy
(APR./MAY)
Repeat process above, compare code
Student recorded, etc., and information put in student file
For kids who must return to sp. ed. program, discussion with present principal
Child put in waiting list
NO
Crisis situation
RED
Action required?
GREEN
O.K.
2 yr. cycle over?
YELLOW
YES
Sp. ed. R.T. brings this information to the sp. ed. placement committee
End of follow-up
C1

10.1.8.1 SPECIAL STUDENT SERVICES: Staff Recruitment and Placement

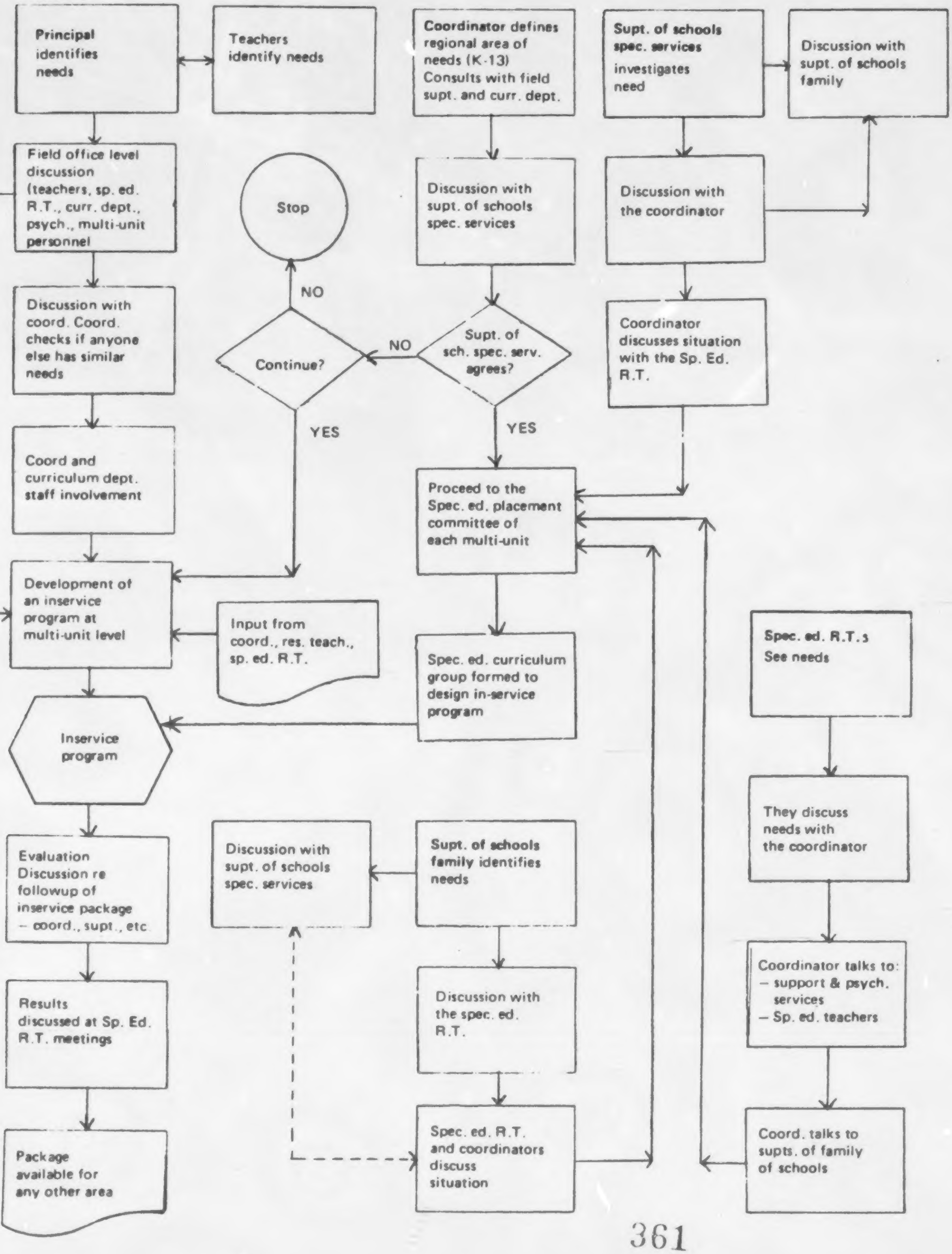
1 – External


Staff needs
Advertisements
– newspapers
– internal
Program approval (C.B.O./supt. of schools family)
Guidelines from CBO
L
Advice from coordinator of sp. ed. when requested
Hiring process (field office)
New staff
Processing of new staff by Personnel dept. at CBO

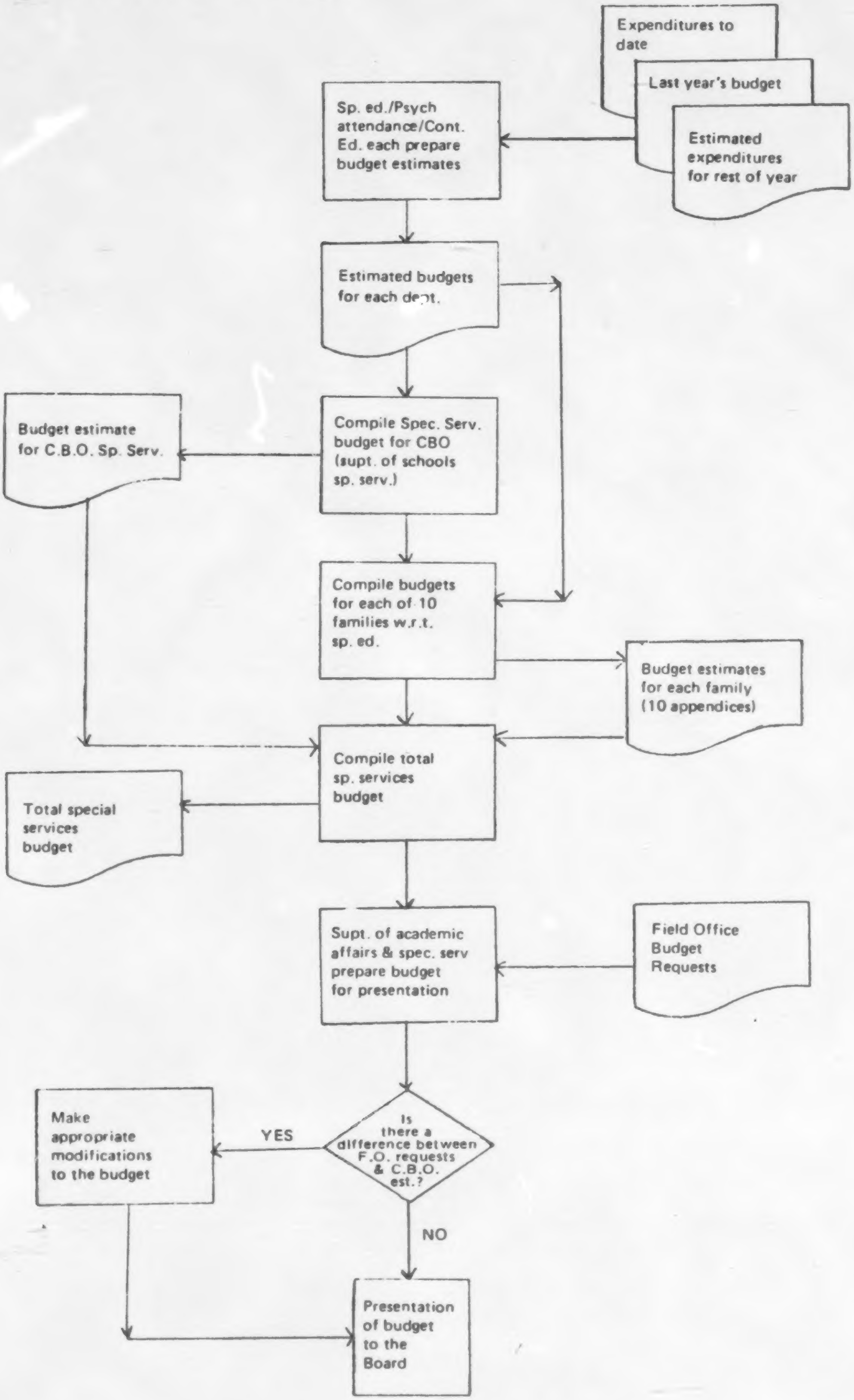
10.1.8.2 SPECIAL STUDENT SERVICES: Staff Recruitment and Placement
2 – Internal


Principals,
Supts. family,
Sp. ed. resource teachers
Coordinator
List of candidates identified by above personnel
Principals
Supt. of schools family
Resource teachers (Sp. Ed.)
Coordinator
List of candidates for Sp. Ed. R.T. identified
Selection of Sp. Ed. teacher candidates from mainstream teachers in Peel county
Selection of Sp. Ed. R.T. candidates from special services staff i.e.
– sp. ed. teachers
– psych. staff, R.T.s
List of candidates
Selection process by Field Office (C.B.O. for SERT only)
List of candidates
L
External hiring to fill remaining positions (N.B. Sp. ed. tchrs. only)
NO
Enough Sp. ed. tchs. candidates internally to fill pos.?
YES
List of personnel for Inservice program
Inservice program [10.1.9]
Information sent to
– Field Office
– CBO
– Principals
Processing of staff by Personnel dept. at CBO

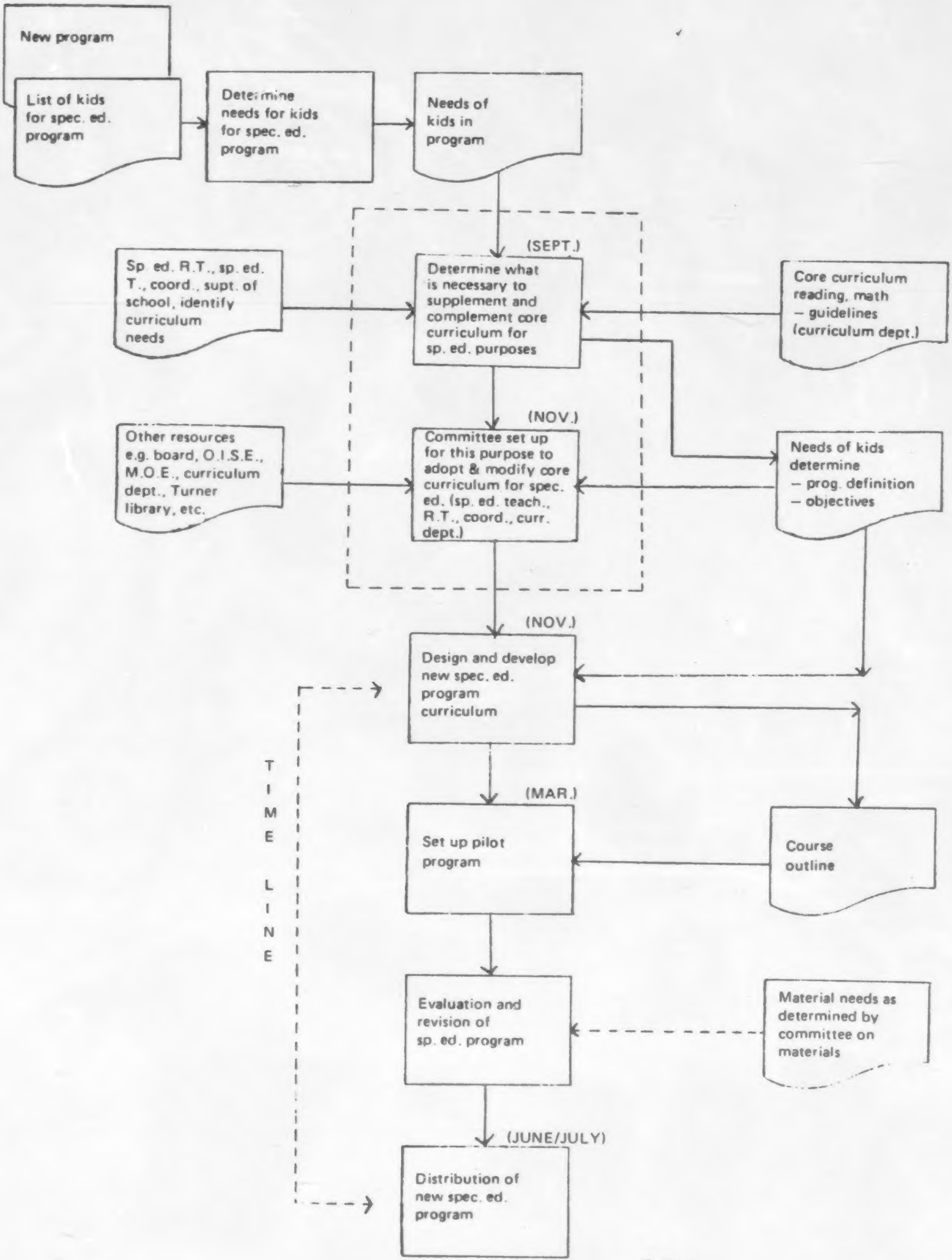
10.1.9 SPECIAL STUDENT SERVICES: Professional Development


Principal identifies needs
Teachers identify needs
Coordinator defines regional area of needs (K-13) Consults with field supt. and curr. dept.
Supt. of schools spec. services investigates need
Discussion with supt. of schools family
Field office level discussion (teachers, sp. ed. R.T., curr. dept., psych., multi-unit personnel
Stop
Discussion with supt. of schools spec. services
Discussion with the coordinator
NO
Discussion with coord. Coord. checks if anyone else has similar needs
Continue?
NO
Supt. of sch. spec. serv. agrees?
Coordinator discusses situation with the Sp. Ed. R.T.
YES
YES
Coord and curriculum dept. staff involvement
Proceed to the Spec. ed. placement committee of each multi-unit
Development of an inservice program at multi-unit level
Input from coord., res. teach., sp. ed. R.T.
Spec. ed. curriculum group formed to design in-service program
Spec. ed. R.T.s See needs
Inservice program
They discuss needs with the coordinator
Evaluation Discussion re followup of inservice package – coord., supt., etc
Discussion with supt. of schools spec. services
Supt. of schools family identifies needs
Coordinator talks to:
– support & psych. services
– Sp. ed. teachers
Results discussed at Sp. Ed. R.T. meetings
Discussion with the spec. ed. R.T.
Package available for any other area
Spec. ed. R.T. and coordinators discuss situation
Coord. talks to supts. of family of schools

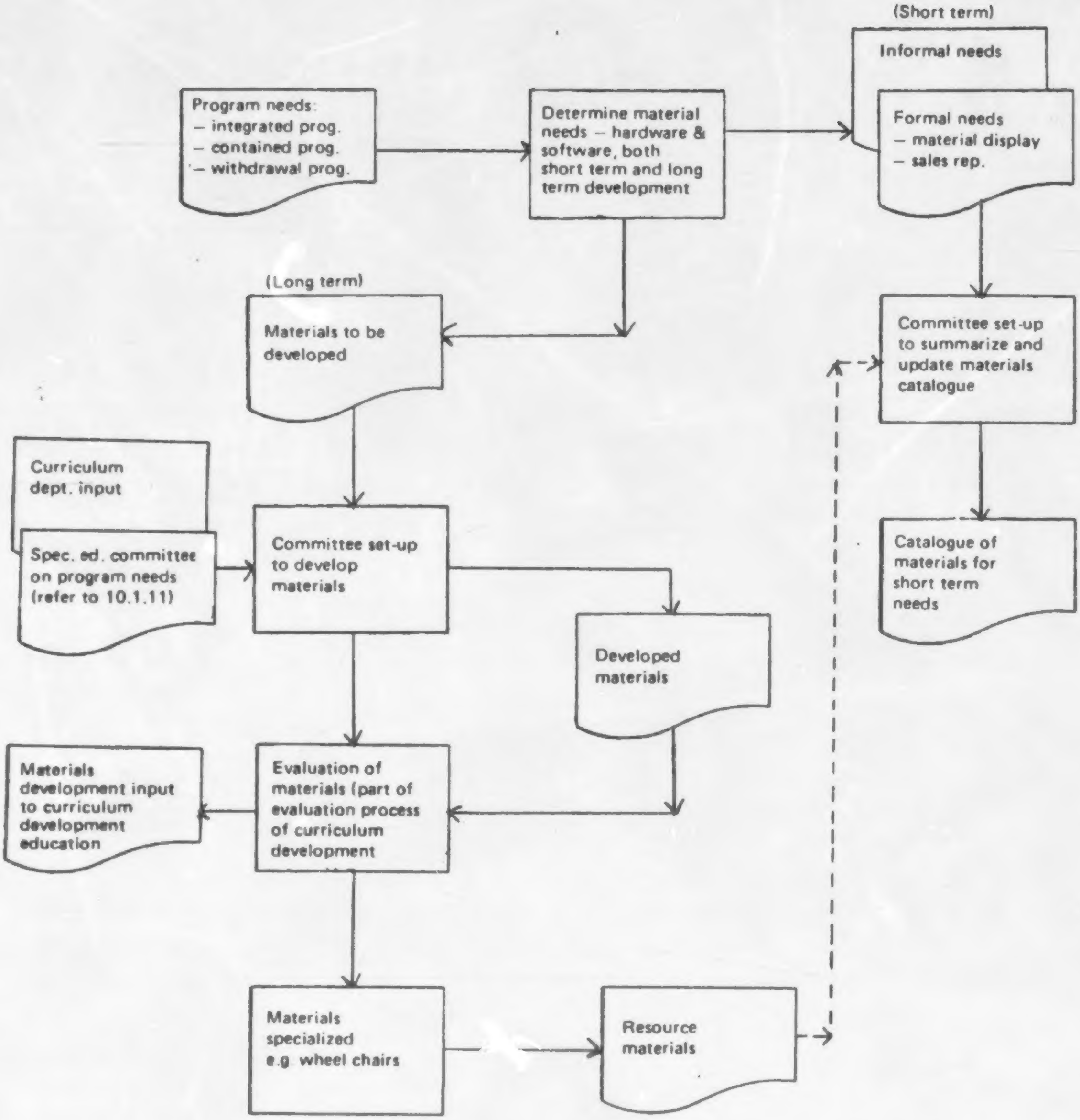
10.1.10 SPECIAL STUDENT SERVICES: Budget


Expenditures to date
Last year's budget
Estimated expenditures for rest of year
Sp. ed./Psych attendance/Cont. Ed. each prepare budget estimates
Estimated budgets for each dept.
Budget estimate for C.B.O. Sp. Serv.
Compile Spec. Serv. budget for CBO (supt. of schools sp. serv.)
Compile budgets for each of 10 families w.r.t. sp. ed.
Budget estimates for each family (10 appendices)
Compile total sp. services budget
Total special services budget
Supt. of academic affairs & spec. serv prepare budget for presentation
Field Office Budget Requests
Is there a difference between F.O. requests & C.B.O. est.?
YES
Make appropriate modifications to the budget
NO
Presentation of budget to the Board

10.1.11 SPECIAL STUDENT SERVICES: Curriculum Development

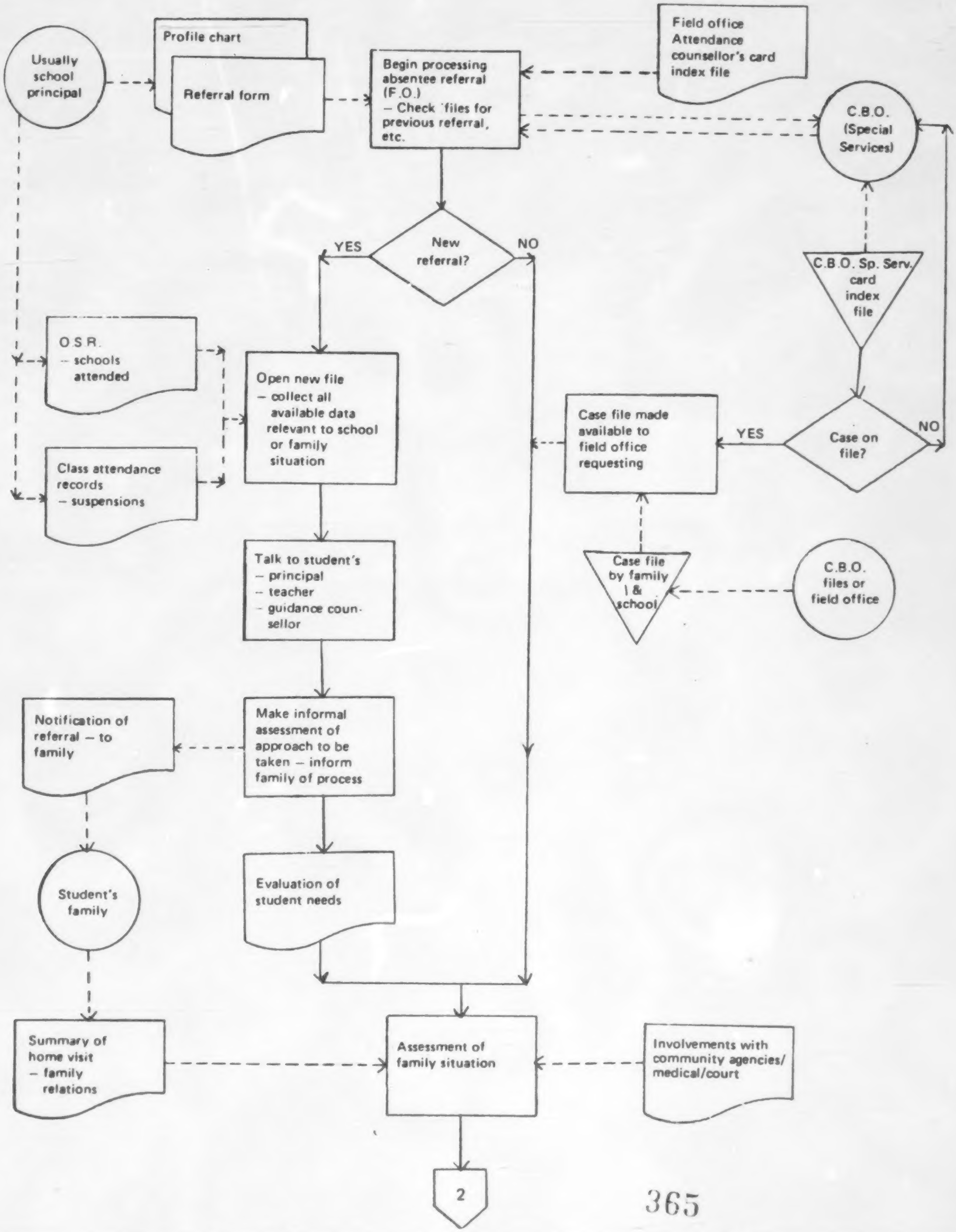

New program
List of kids for spec. ed. program
Determine needs for kids for spec. ed. program
Needs of kids in program
(SEPT.)
Sp. ed. R.T., sp. ed. T., coord., supt. of school, identify curriculum needs
Determine what is necessary to supplement and complement core curriculum for sp. ed. purposes
Core curriculum reading, math – guidelines (curriculum dept.)
(NOV.)
Other resources e.g. board, O.I.S.E., M.O.E., curriculum dept., Turner library, etc.
Committee set up for this purpose to adopt & modify core curriculum for spec. ed. (sp. ed. teach., R.T., coord., curr. dept.)
Needs of kids determine – prog. definition – objectives
(NOV.)
Design and develop new spec. ed. program curriculum
T I M E L I N E
(MAR.)
Set up pilot program
Course outline
Evaluation and revision of sp. ed. program
Material needs as determined by committee on materials
(JUNE/JULY)
Distribution of new spec. ed. program

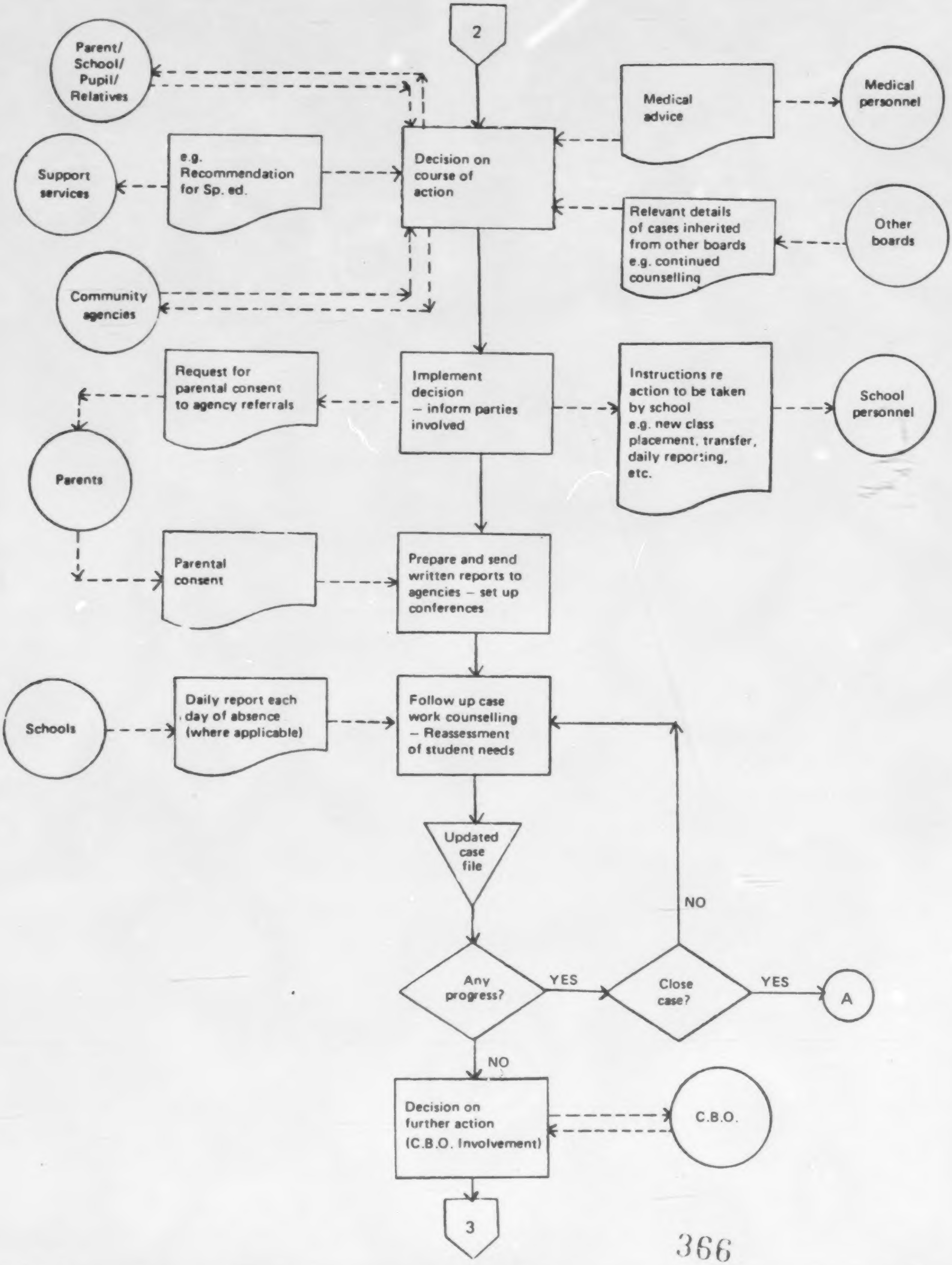
10.1.12 SPECIAL STUDENT SERVICES: Material Development

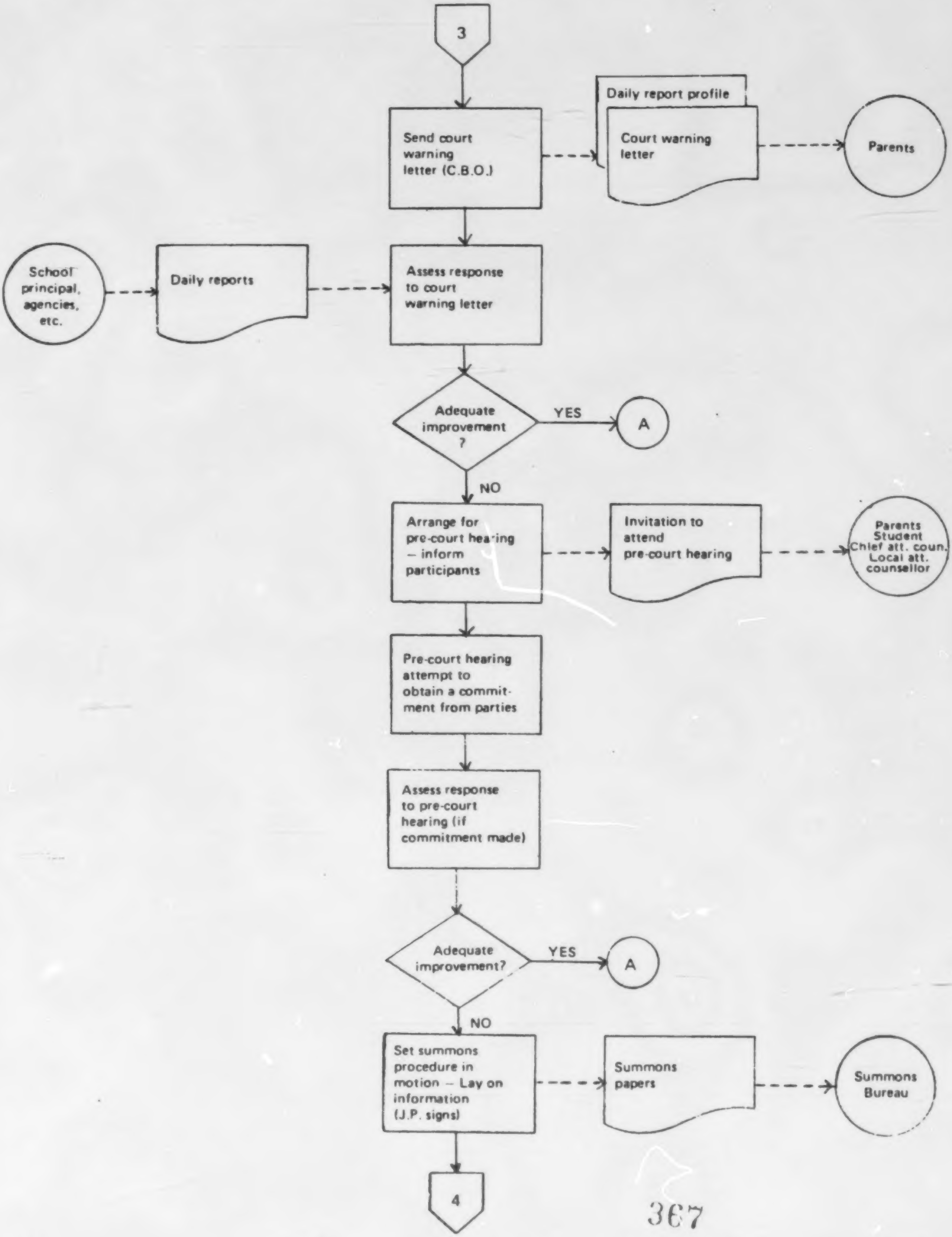

Program needs:
– integrated prog.
– contained prog.
– withdrawal prog.
Determine material needs – hardware & software, both short term and long term development
(Short term)
Informal needs
Formal needs
– material display
– sales rep.
(Long term)
Materials to be developed
Committee set-up to summarize and update materials catalogue
Curriculum dept. input
Spec. ed. committee on program needs (refer to 10.1.11)
Committee set-up to develop materials
Catalogue of materials for short term needs
Developed materials
Materials development input to curriculum development education
Evaluation of materials (part of evaluation process of curriculum development
Materials specialized e.g. wheel chairs
Resource materials

10.2.1.1 SPECIAL STUDENT SERVICES: Attendance — Casework

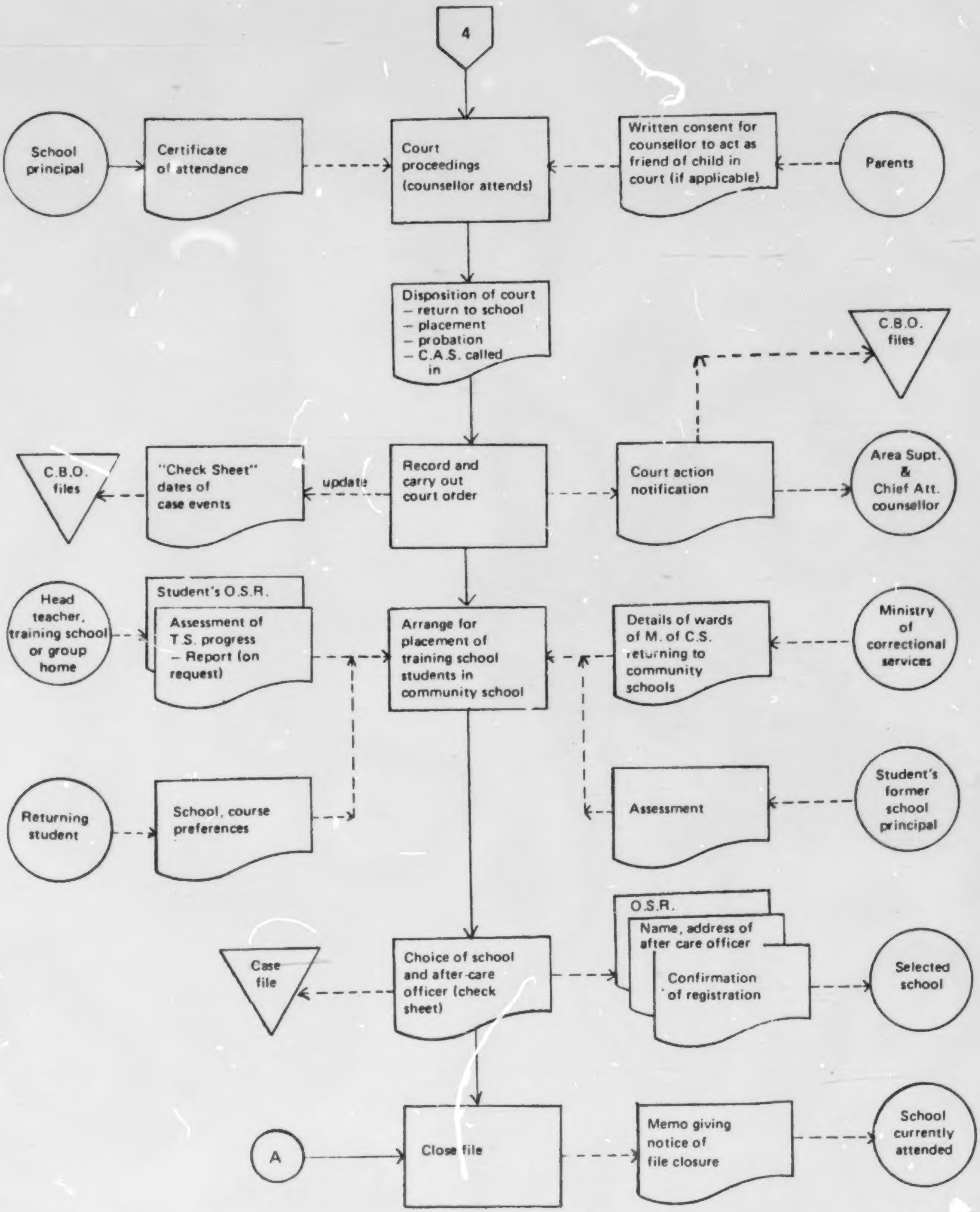
1 of 4


Usually school principal
Profile chart
Referral form
Begin processing absentee referral (F.O.) – Check files for previous referral, etc.
Field office Attendance counsellor's card index file
C.B.O. (Special Services)
New referral?
YES
NO
C.B.O. Sp. Serv. card index file
O.S.R. – schools attended
Class attendance records – suspensions
Open new file – collect all available data relevant to school or family situation
Case file made available to field office requesting
YES
Case on file?
NO
Case file by family & school
C.B.O. files or field office
Talk to student's – principal – teacher – guidance counsellor
Notification of referral – to family
Make informal assessment of approach to be taken – inform family of process
Student's family
Evaluation of student needs
Summary of home visit – family relations
Assessment of family situation
Involvements with community agencies/ medical/court
2

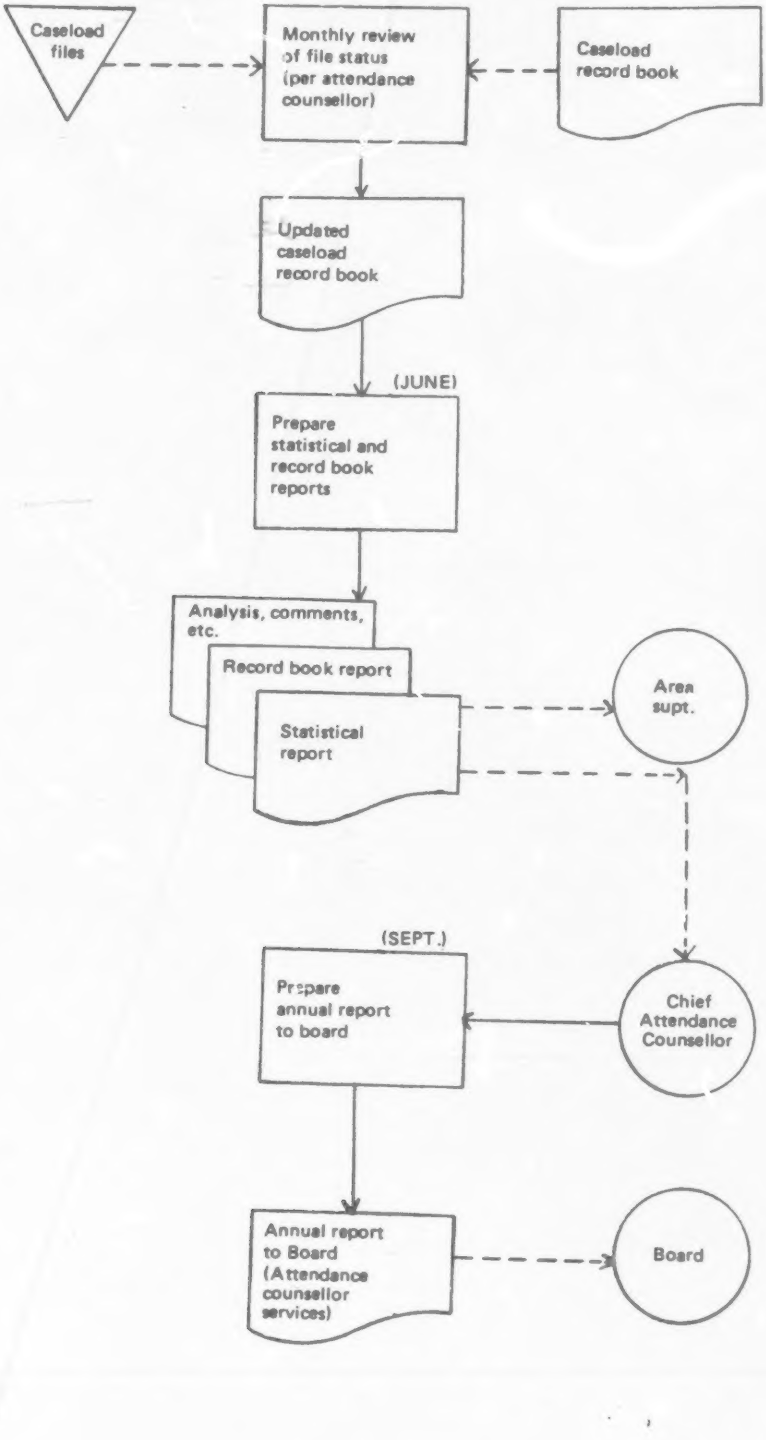

2
Parent/ School/ Pupil/ Relatives
Medical advice
Medical personnel
Support services
e.g. Recommendation for Sp. ed.
Decision on course of action
Relevant details of cases inherited from other boards e.g. continued counselling
Other boards
Community agencies
Request for parental consent to agency referrals
Implement decision – inform parties involved
Instructions re action to be taken by school e.g. new class placement, transfer, daily reporting, etc.
School personnel
Parents
Parental consent
Prepare and send written reports to agencies – set up conferences
Schools
Daily report each day of absence (where applicable)
Follow up case work counselling – Reassessment of student needs
Updated case file
NO
Any progress?
YES
Close case?
YES
A
NO
Decision on further action (C.B.O. Involvement)
C.B.O.
3


3
Send court warning letter (C.B.O.)
Daily report profile
Court warning letter
Parents
School principal, agencies, etc.
Daily reports
Assess response to court warning letter
Adequate improvement ?
YES
A
NO
Arrange for pre-court hearing – inform participants
Invitation to attend pre-court hearing
Parents Student Chief att. coun. Local att. counsellor
Pre-court hearing attempt to obtain a commitment from parties
Assess response to pre-court hearing (if commitment made)
Adequate improvement?
YES
A
NO
Set summons procedure in motion – Lay on information (J.P. signs)
Summons papers
Summons Bureau
4

10.2.1.1 (cont'd)

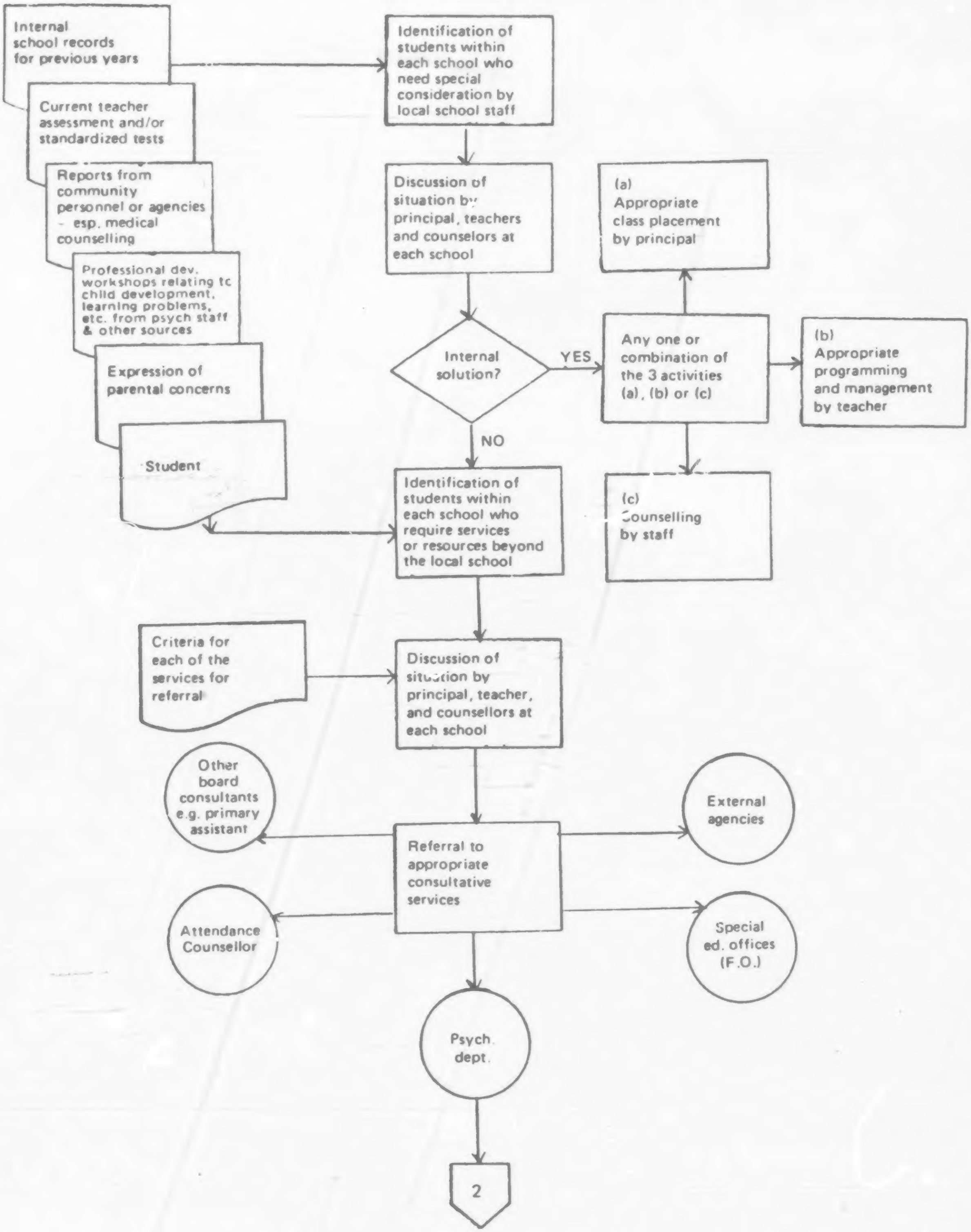

4
School principal
Certificate of attendance
Court proceedings (counsellor attends)
Written consent for counsellor to act as friend of child in court (if applicable)
Parents
Disposition of court
– return to school
– placement
– probation
– C.A.S. called in
C.B.O. files
C.B.O. files
"Check Sheet" dates of case events
update
Record and carry out court order
Court action notification
Area Supt. & Chief Att. counsellor
Head teacher, training school or group home
Student's O.S.R.
Assessment of T.S. progress – Report (on request)
Arrange for placement of training school students in community school
Details of wards of M. of C.S. returning to community schools
Ministry of correctional services
Returning student
School, course preferences
Assessment
Student's former school principal
Case file
Choice of school and after-care officer (check sheet)
O.S.R.
Name, address of after care officer
Confirmation of registration
Selected school
A
Close file
Memo giving notice of file closure
School currently attended

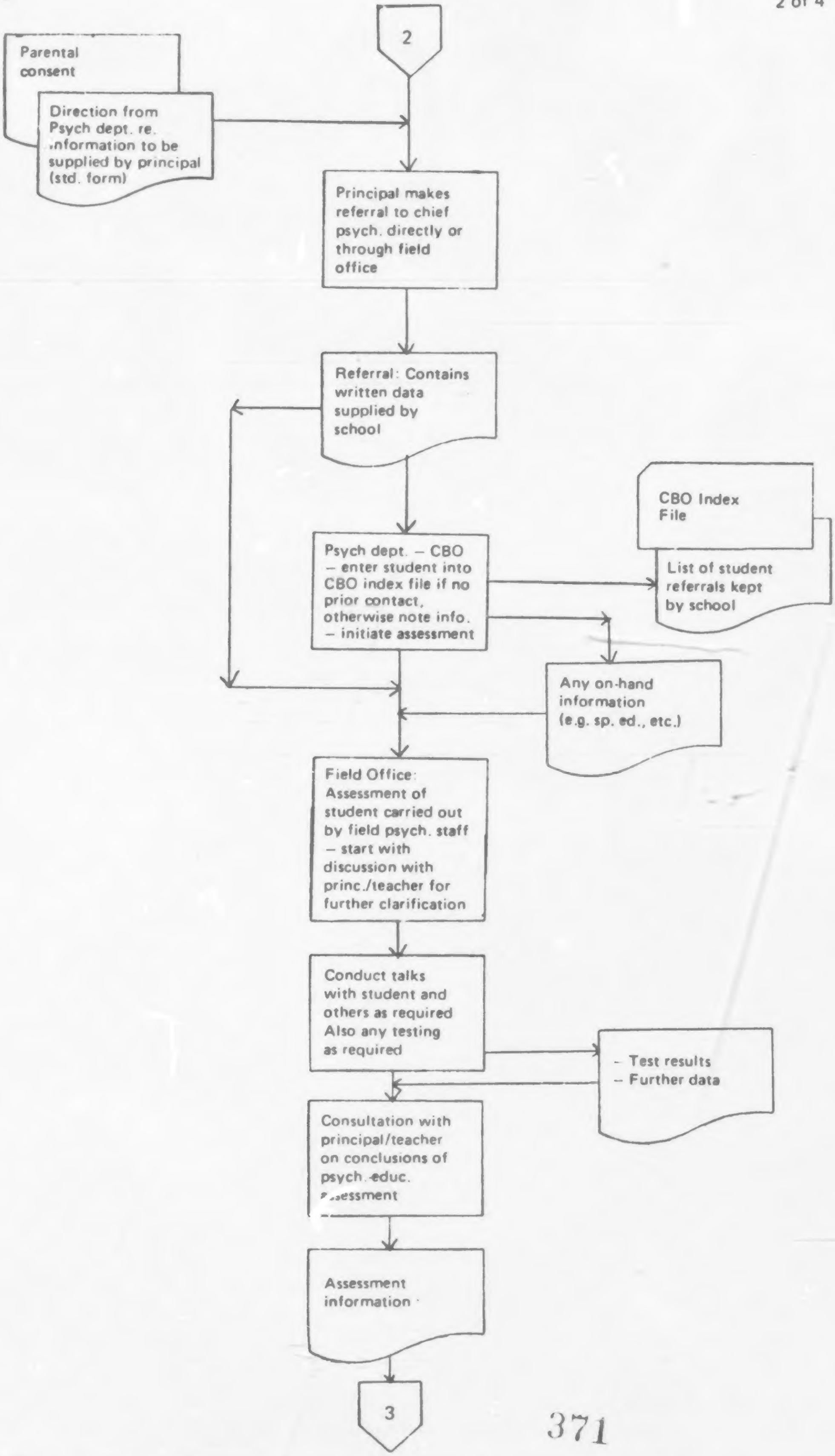
10.2.4 SPECIAL STUDENT SERVICES: Attendance – Reporting

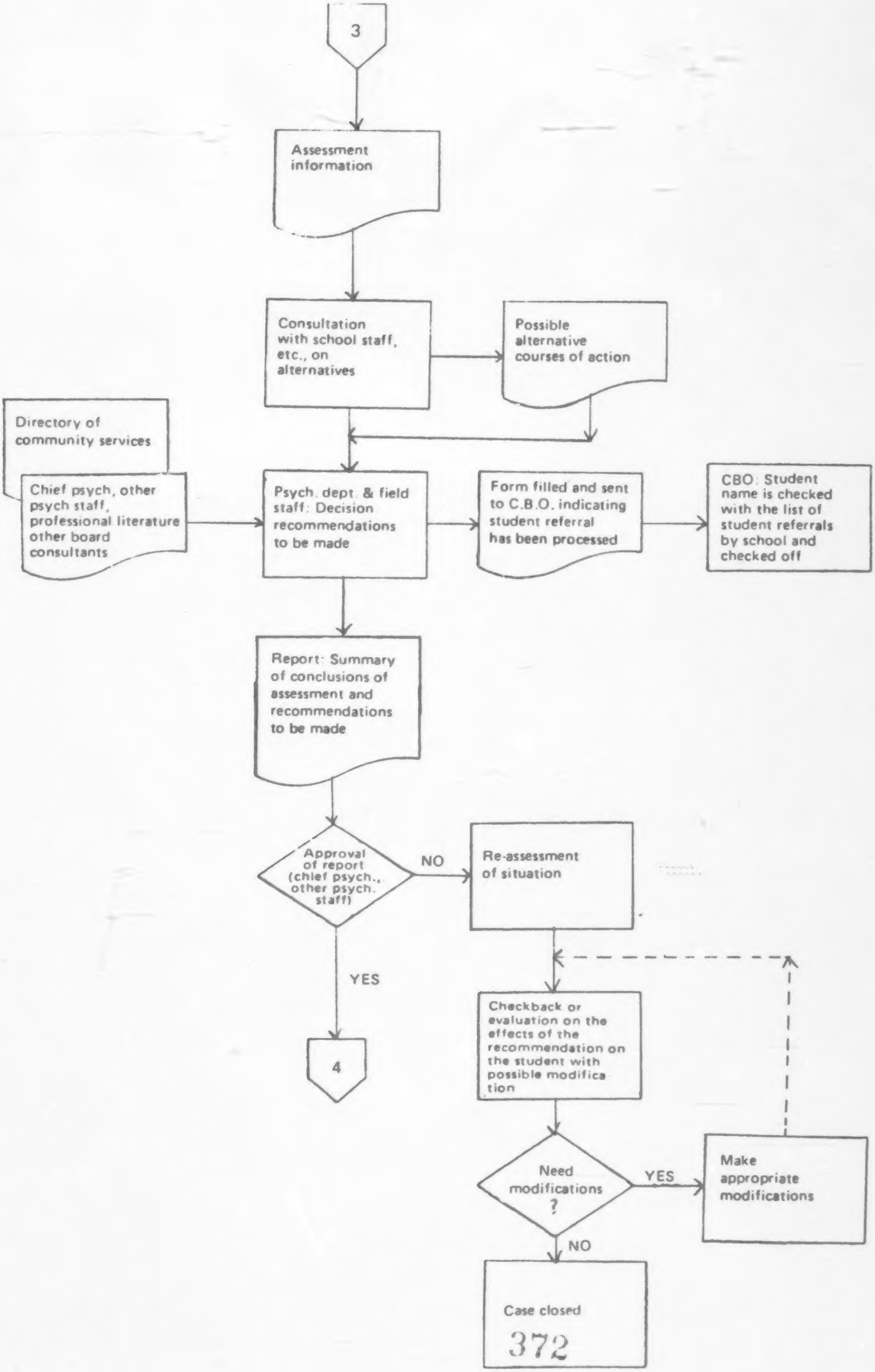

Caseload files
Monthly review of file status (per attendance counsellor)
Caseload record book
Updated caseload record book
(JUNE)
Prepare statistical and record book reports
Analysis, comments, etc.
Record book report
Statistical report
Area supt.
(SEPT.)
Prepare annual report to board
Chief Attendance Counsellor
Annual report to Board (Attendance counsellor services)
Board

10.3.1 SPECIAL STUDENT SERVICES: Psychology Dept. – Psycho-Educational Diagnostic and Programming Services

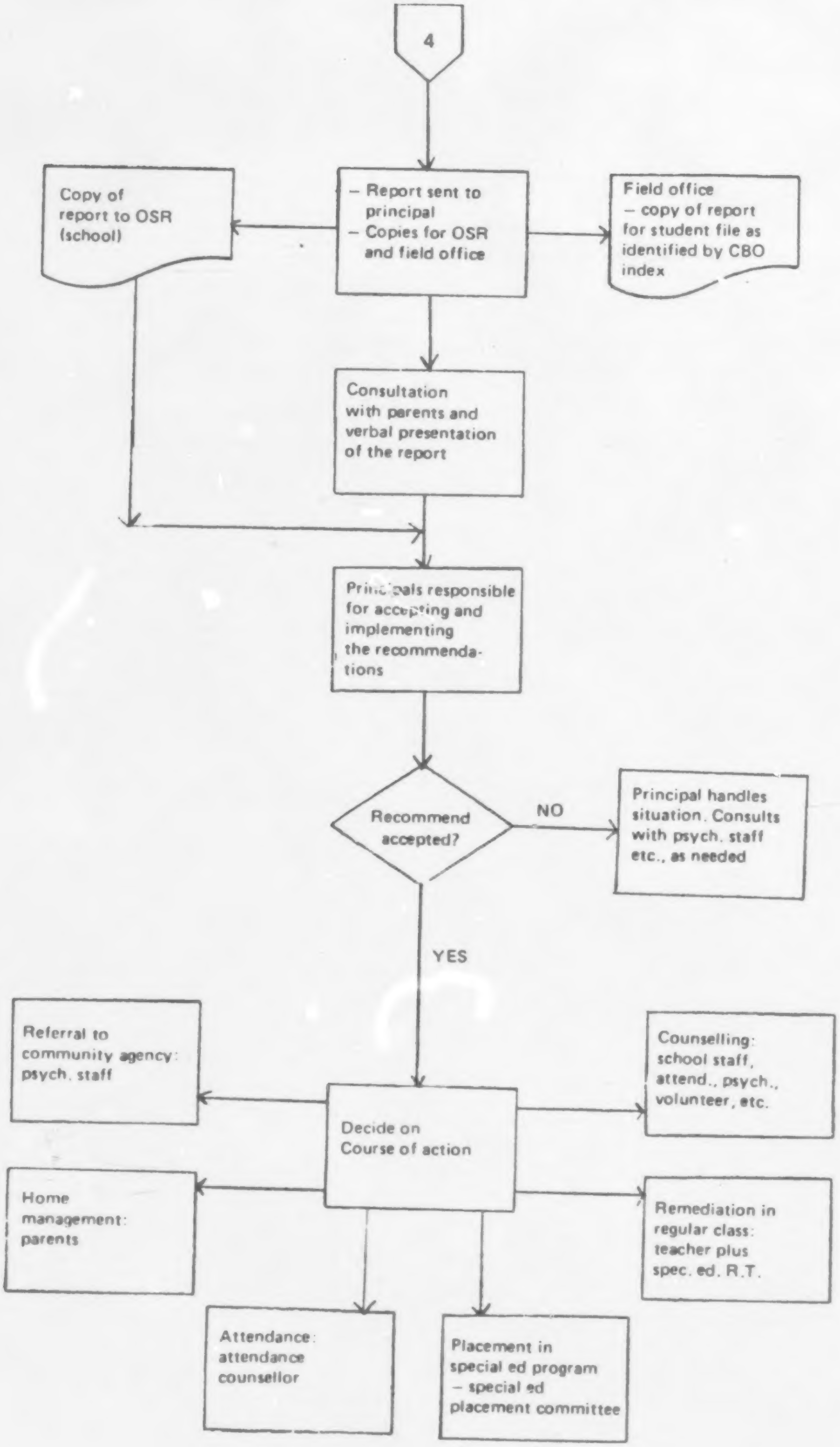
1 of 4


Internal school records for previous years
Current teacher assessment and/or standardized tests
Reports from community personnel or agencies – esp. medical counselling
Professional dev. workshops relating to child development, learning problems, etc. from psych staff & other sources
Expression of parental concerns
Student
Identification of students within each school who need special consideration by local school staff
Discussion of situation by principal, teachers and counselors at each school
Internal solution?
YES
NO
Any one or combination of the 3 activities (a), (b) or (c)
(a) Appropriate class placement by principal
(b) Appropriate programming and management by teacher
(c) Counselling by staff
Identification of students within each school who require services or resources beyond the local school
Criteria for each of the services for referral
Discussion of situation by principal, teacher, and counsellors at each school
Referral to appropriate consultative services
Other board consultants e.g. primary assistant
Attendance Counsellor
External agencies
Special ed. offices (F.O.)
Psych. dept.
2


2
Parental consent
Direction from Psych dept. re. information to be supplied by principal (std. form)
Principal makes referral to chief psych. directly or through field office
Referral: Contains written data supplied by school
CBO Index File
List of student referrals kept by school
Psych dept. – CBO – enter student into CBO index file if no prior contact, otherwise note info. – initiate assessment
Any on-hand information (e.g. sp. ed., etc.)
Field Office: Assessment of student carried out by field psych. staff – start with discussion with princ./teacher for further clarification
Conduct talks with student and others as required Also any testing as required
– Test results – Further data
Consultation with principal/teacher on conclusions of psych.-educ. assessment
Assessment information
3

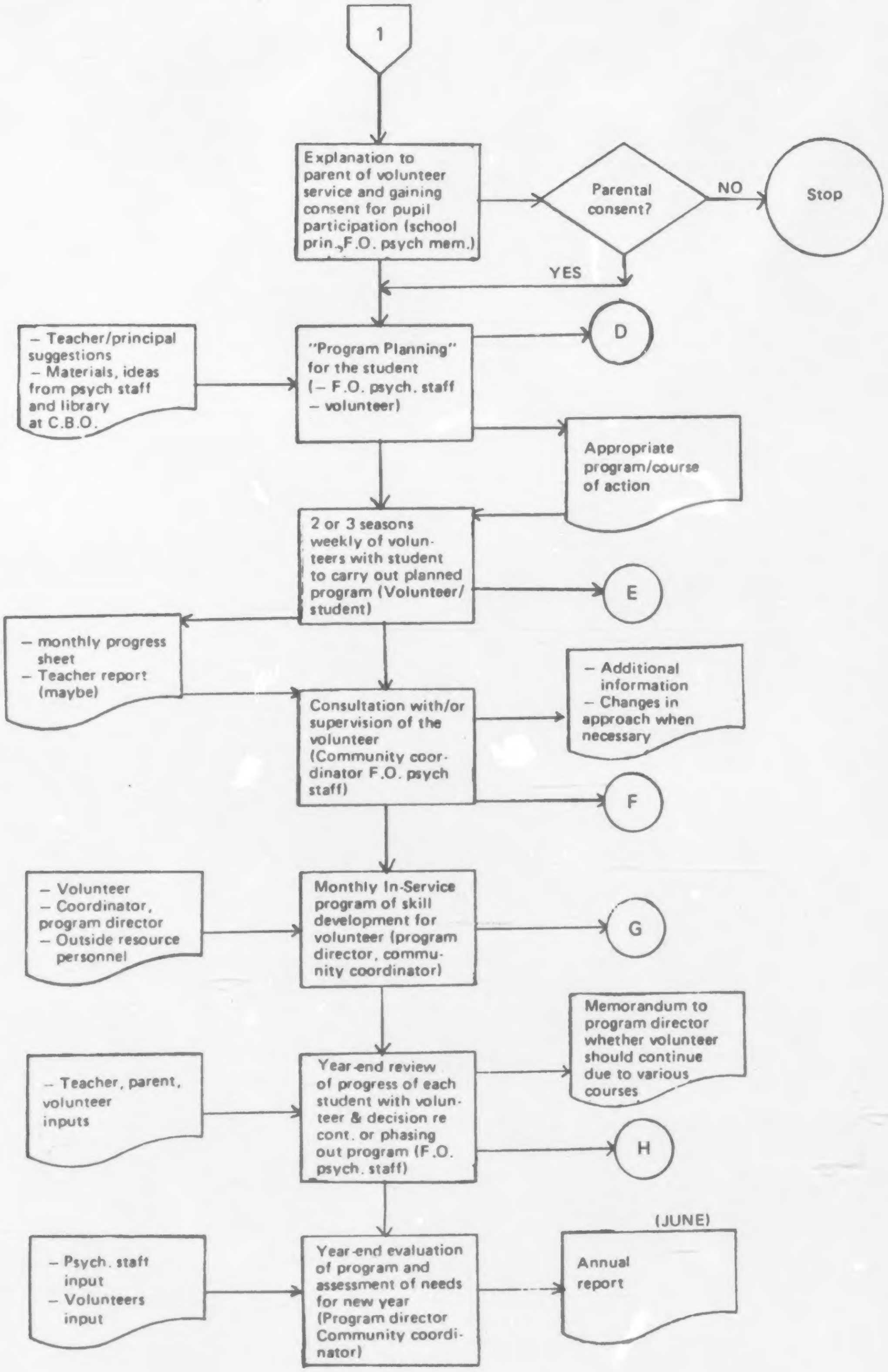

3
Assessment information
Consultation with school staff, etc., on alternatives
Possible alternative courses of action
Directory of community services
Chief psych, other psych staff, professional literature other board consultants
Psych. dept. & field staff: Decision recommendations to be made
Form filled and sent to C.B.O. indicating student referral has been processed
CBO: Student name is checked with the list of student referrals by school and checked off
Report: Summary of conclusions of assessment and recommendations to be made
Approval of report (chief psych., other psych. staff)
NO
Re-assessment of situation
YES
4
Checkback or evaluation on the effects of the recommendation on the student with possible modification
Need modifications ?
YES
Make appropriate modifications
NO
Case closed

10.3.1 (cont'd)

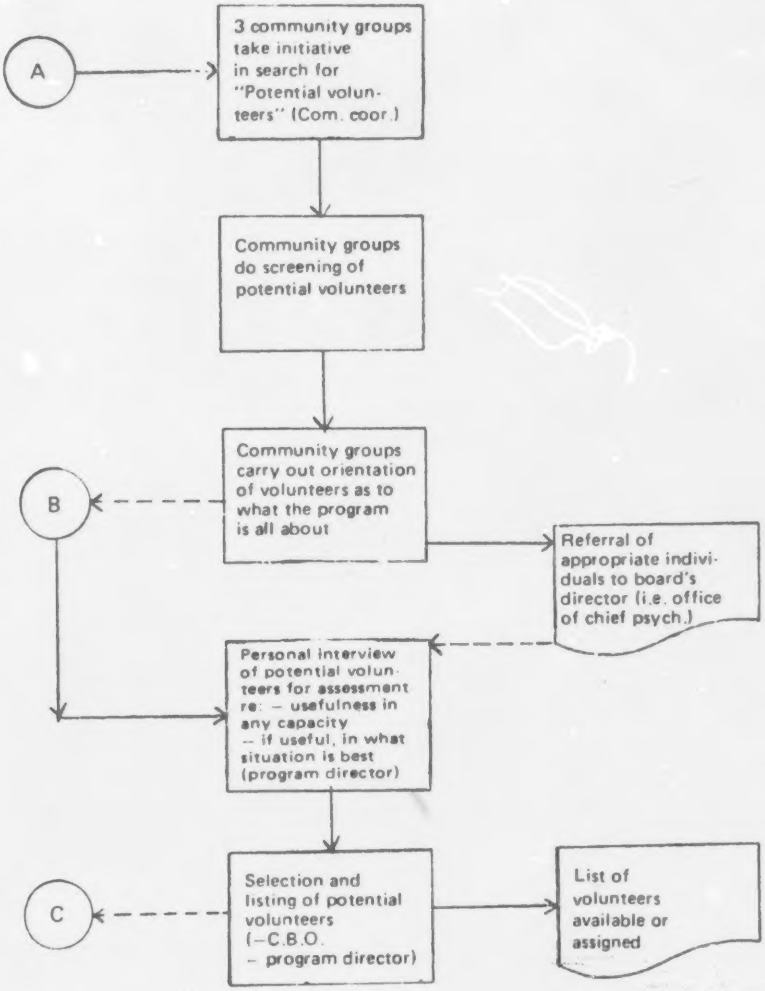

4
– Report sent to principal
– Copies for OSR and field office
Copy of report to OSR (school)
Field office
– copy of report for student file as identified by CBO index
Consultation with parents and verbal presentation of the report
Principals responsible for accepting and implementing the recommendations
Recommend accepted?
NO
Principal handles situation. Consults with psych. staff etc., as needed
YES
Decide on Course of action
Referral to community agency: psych. staff
Counselling: school staff, attend., psych., volunteer, etc.
Home management: parents
Remediation in regular class: teacher plus spec. ed. R.T.
Attendance: attendance counsellor
Placement in special ed program – special ed placement committee

10.3.2.1 (cont'd)

2 of 2

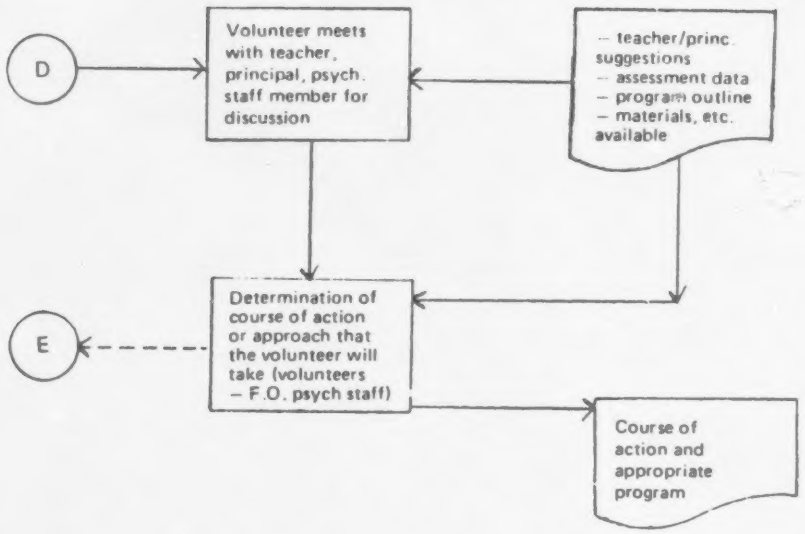

1
Explanation to parent of volunteer service and gaining consent for pupil participation (school prin.,F.O. psych mem.)
Parental consent?
NO
Stop
YES
– Teacher/principal suggestions
– Materials, ideas from psych staff and library at C.B.O.
"Program Planning" for the student (– F.O. psych. staff – volunteer)
D
Appropriate program/course of action
2 or 3 seasons weekly of volunteers with student to carry out planned program (Volunteer/student)
E
– monthly progress sheet
– Teacher report (maybe)
Consultation with/or supervision of the volunteer (Community coordinator F.O. psych staff)
– Additional information
– Changes in approach when necessary
F
– Volunteer
– Coordinator, program director
– Outside resource personnel
Monthly In-Service program of skill development for volunteer (program director, community coordinator)
G
– Teacher, parent, volunteer inputs
Year-end review of progress of each student with volunteer & decision re cont. or phasing out program (F.O. psych. staff)
Memorandum to program director whether volunteer should continue due to various courses
H
– Psych. staff input
– Volunteers input
Year-end evaluation of program and assessment of needs for new year (Program director Community coordinator)
(JUNE)
Annual report

10.3.2.2 SPECIAL STUDENT SERVICES: Psychology Dept. – One with One" Volunteer Program (Search, Screening and Final Selection of Volunteers)


A
3 community groups take initiative in search for "Potential volunteers" (Com. coor.)
Community groups do screening of potential volunteers
B
Community groups carry out orientation of volunteers as to what the program is all about
Referral of appropriate individuals to board's director (i.e. office of chief psych.)
Personal interview of potential volunteers for assessment re: – usefulness in any capacity -- if useful, in what situation is best (program director)
C
Selection and listing of potential volunteers (–C.B.O. – program director)
List of volunteers available or assigned

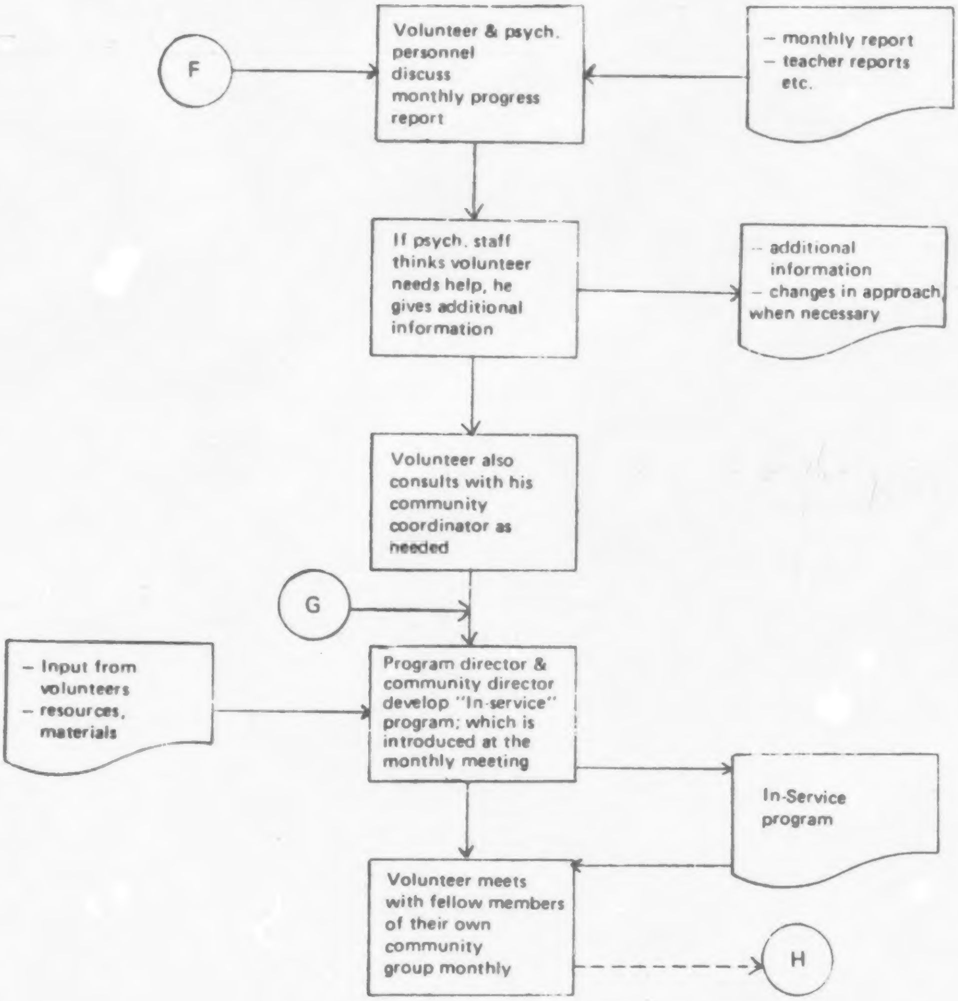
10.3.2.3 SPECIAL STUDENT SERVICES: Psychology Dept. "One with One" Volunteer Program (Program Planning for the Student)

(1 of 2)

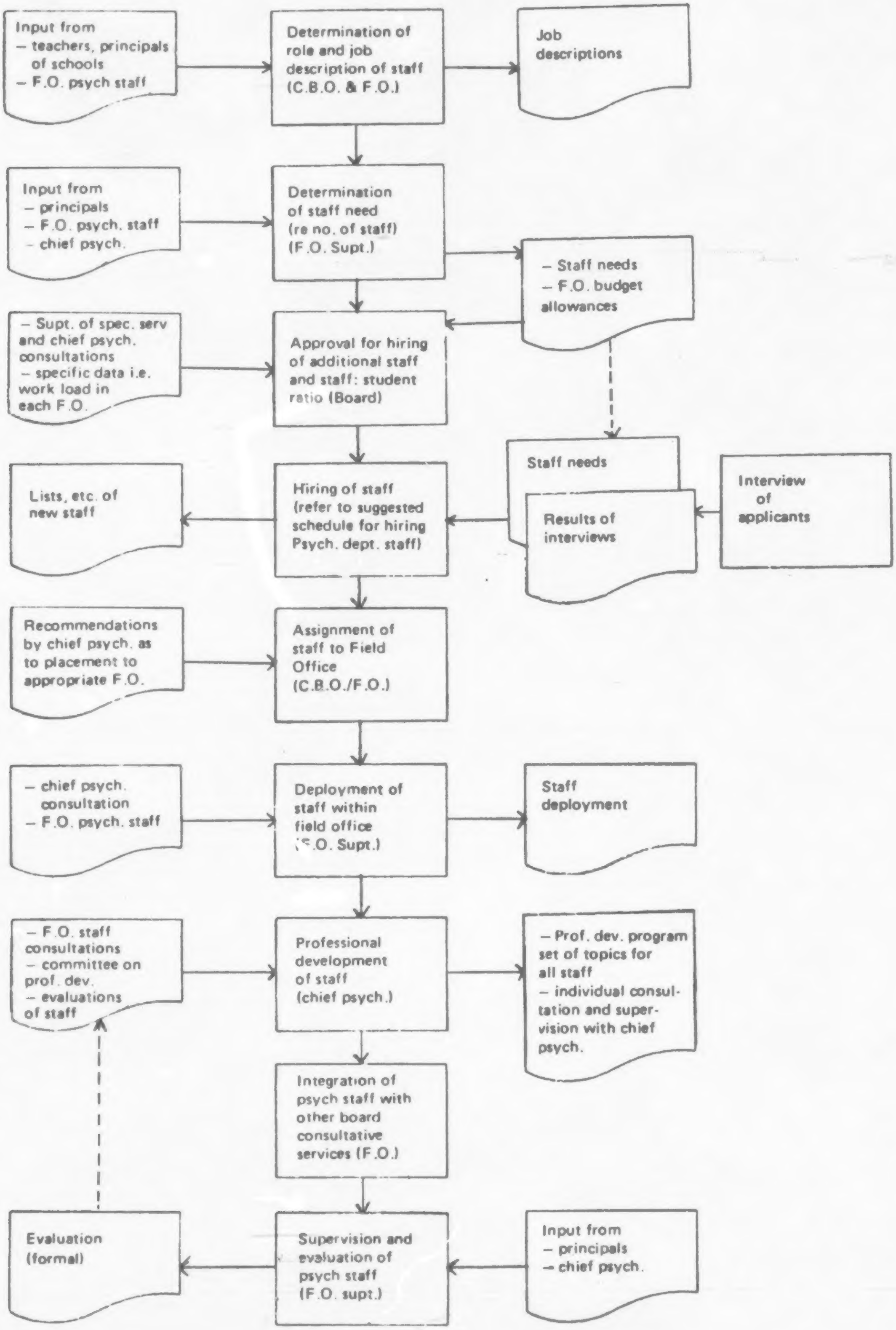

D
Volunteer meets with teacher, principal, psych. staff member for discussion
– teacher/princ. suggestions
– assessment data
– program outline
– materials, etc. available
E
Determination of course of action or approach that the volunteer will take (volunteers – F.O. psych staff)
Course of action and appropriate program

10.3.2.3 SPECIAL STUDENT SERVICES: Psychology Dept. "One with One" Volunteer Program

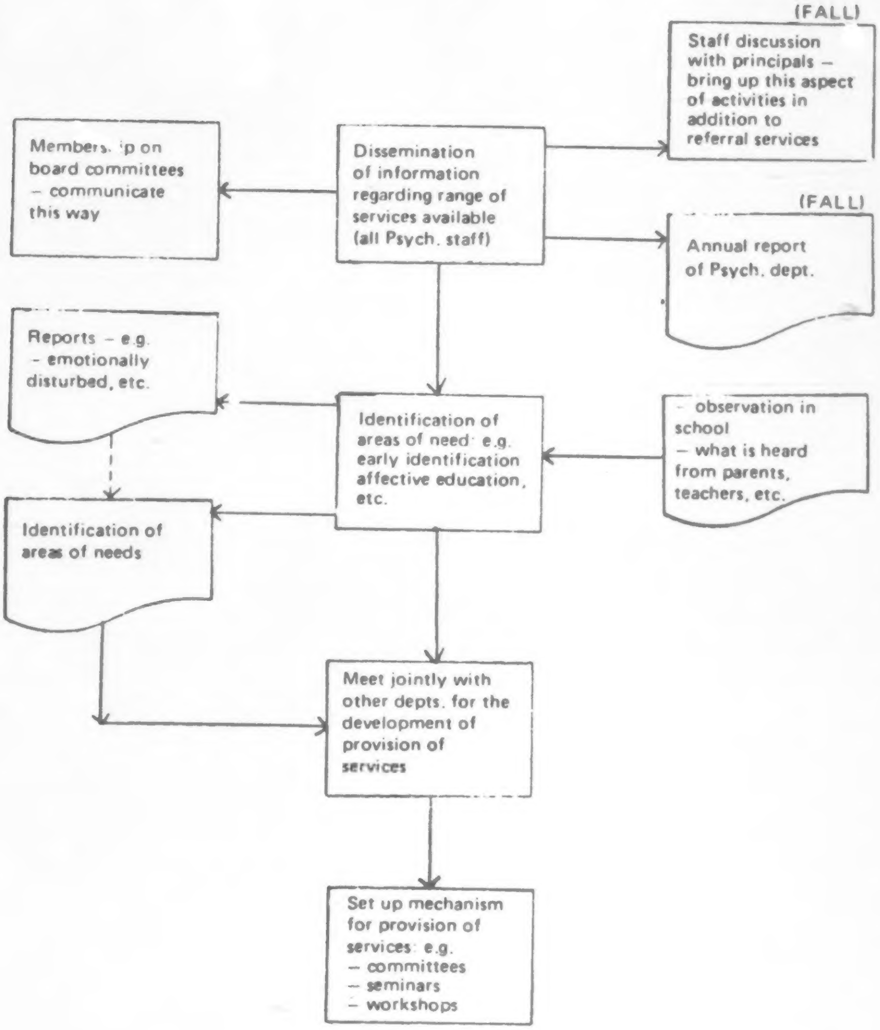
2 of 2


F
Volunteer & psych. personnel discuss monthly progress report
– monthly report
– teacher reports etc.
If psych. staff thinks volunteer needs help, he gives additional information
– additional information
– changes in approach, when necessary
Volunteer also consults with his community coordinator as needed
G
– Input from volunteers
– resources, materials
Program director & community director develop "In-service" program; which is introduced at the monthly meeting
In-Service program
Volunteer meets with fellow members of their own community group monthly
H

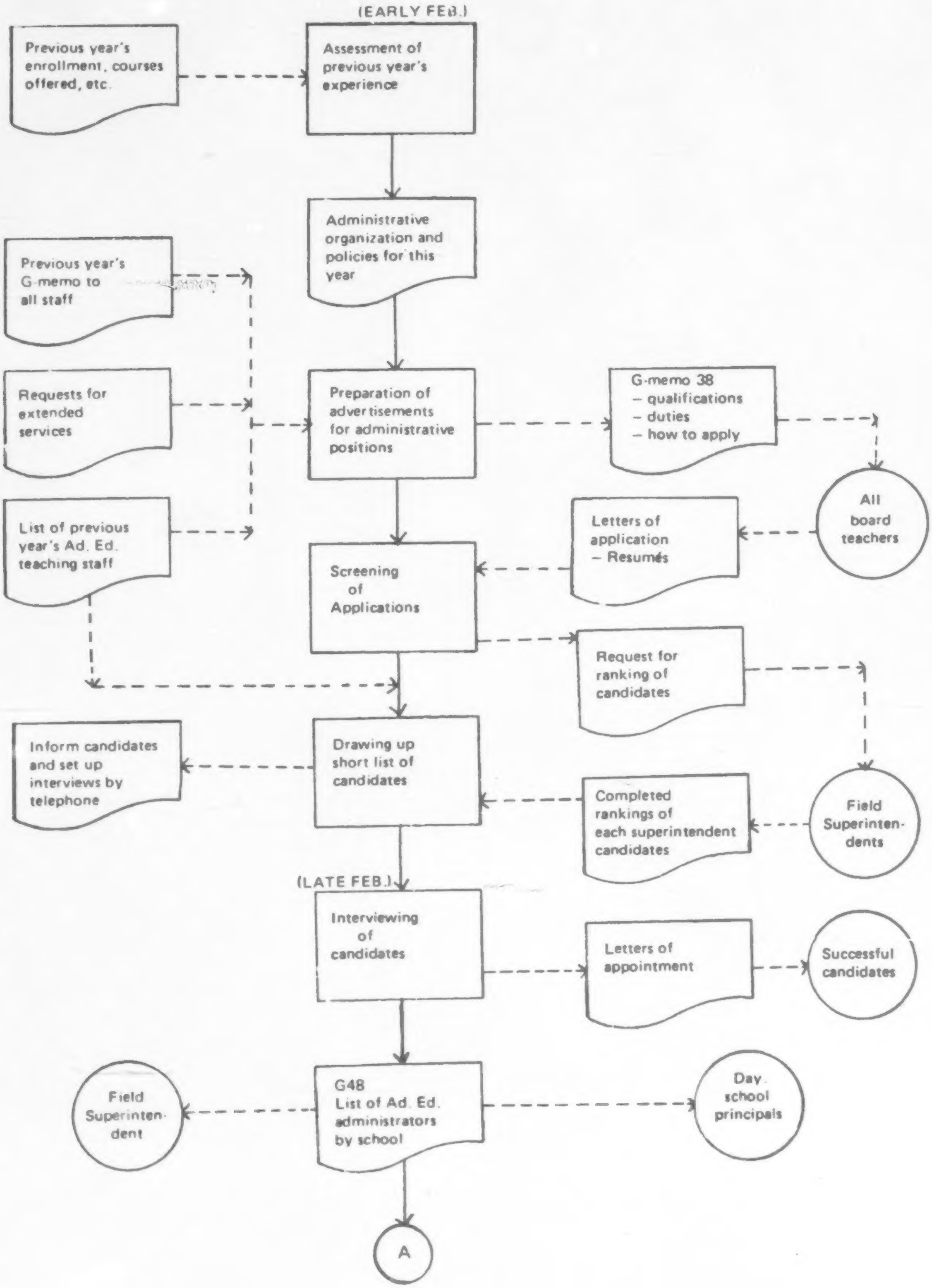
10.3.3 SPECIAL STUDENT SERVICES: Psychology Dept. – Administration


Input from
– teachers, principals of schools
– F.O. psych staff
Determination of role and job description of staff (C.B.O. & F.O.)
Job descriptions
Input from
– principals
– F.O. psych. staff
– chief psych.
Determination of staff need (re no. of staff) (F.O. Supt.)
– Staff needs
– F.O. budget allowances
– Supt. of spec. serv and chief psych. consultations
– specific data i.e. work load in each F.O.
Approval for hiring of additional staff and staff: student ratio (Board)
Staff needs
Results of interviews
Interview of applicants
Lists, etc. of new staff
Hiring of staff (refer to suggested schedule for hiring Psych. dept. staff)
Recommendations by chief psych. as to placement to appropriate F.O.
Assignment of staff to Field Office (C.B.O./F.O.)
– chief psych. consultation
– F.O. psych. staff
Deployment of staff within field office (F.O. Supt.)
Staff deployment
– F.O. staff consultations
– committee on prof. dev.
– evaluations of staff
Professional development of staff (chief psych.)
– Prof. dev. program set of topics for all staff
– individual consultation and supervision with chief psych.
Integration of psych staff with other board consultative services (F.O.)
Evaluation (formal)
Supervision and evaluation of psych staff (F.O. supt.)
Input from
– principals
– chief psych.

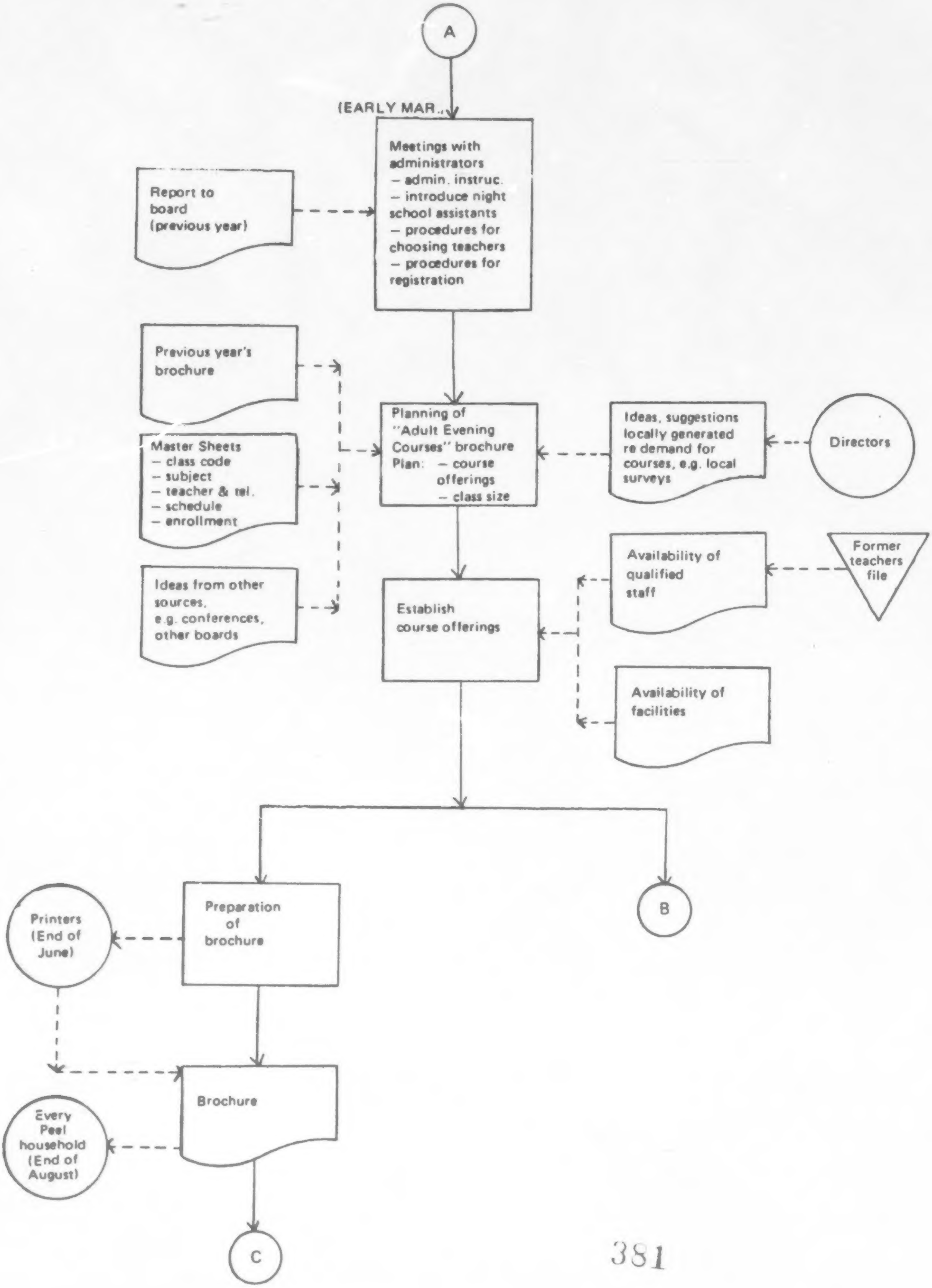
10.3.4 SPECIAL STUDENT SERVICES: Psychology Dept. – General Resource and Consultative Services


(FALL)
Staff discussion with principals – bring up this aspect of activities in addition to referral services
Membership on board committees – communicate this way
Dissemination of information regarding range of services available (all Psych. staff)
(FALL)
Annual report of Psych. dept.
Reports – e.g. – emotionally disturbed, etc.
Identification of areas of need: e.g. early identification affective education, etc.
– observation in school – what is heard from parents, teachers, etc.
Identification of areas of needs
Meet jointly with other depts. for the development of provision of services
Set up mechanism for provision of services: e.g. – committees – seminars – workshops

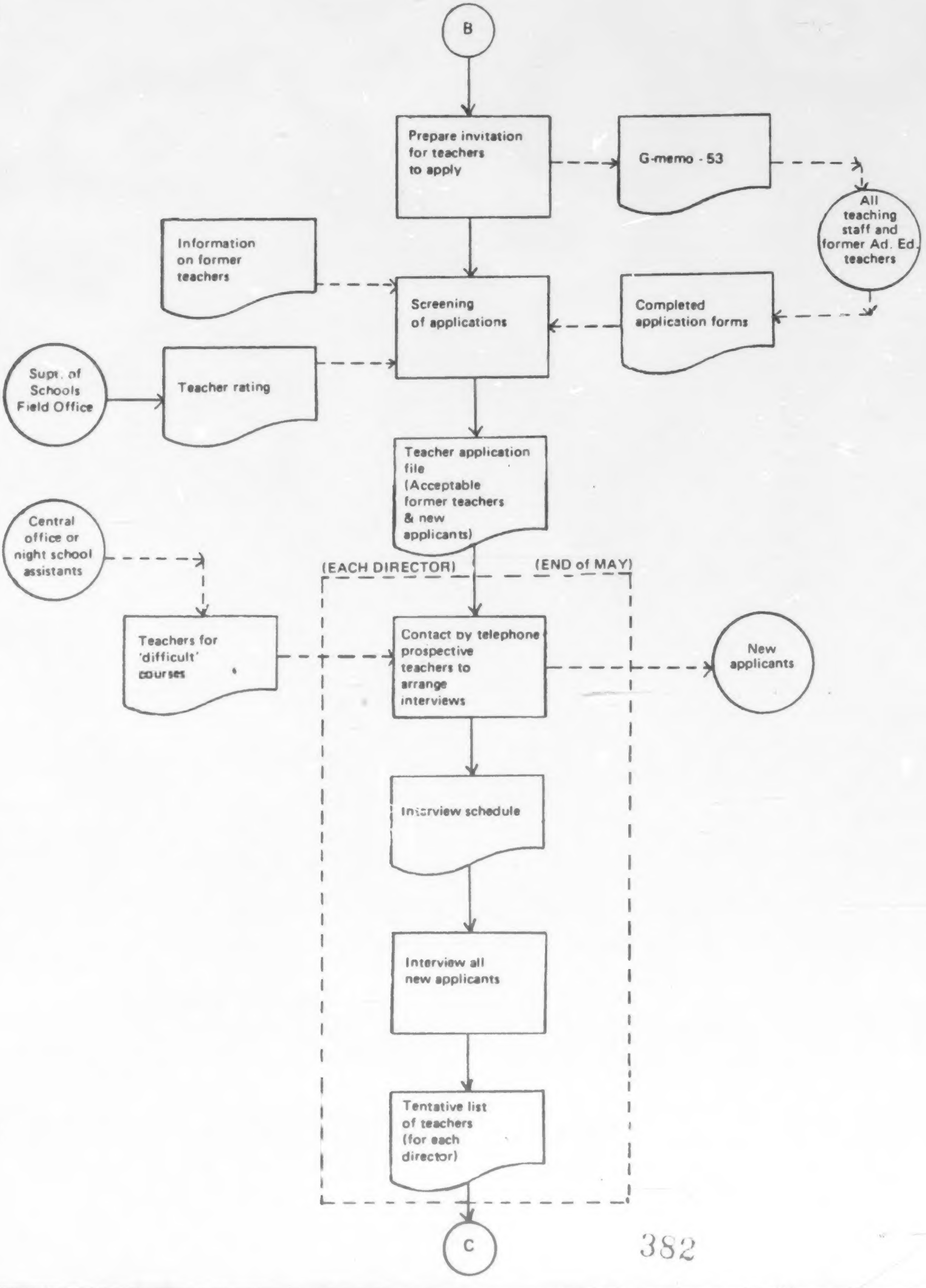
11.1.1 CONTINUING EDUCATION: Adult Education – Selection of Administrative Staff


(EARLY FEB.)
Previous year's enrollment, courses offered, etc.
Assessment of previous year's experience
Administrative organization and policies for this year
Previous year's G-memo to all staff
Requests for extended services
List of previous year's Ad. Ed. teaching staff
Preparation of advertisements for administrative positions
G-memo 38 – qualifications – duties – how to apply
All board teachers
Letters of application – Resumés
Screening of Applications
Request for ranking of candidates
Drawing up short list of candidates
Inform candidates and set up interviews by telephone
Completed rankings of each superintendent candidates
Field Superintendents
(LATE FEB.)
Interviewing of candidates
Letters of appointment
Successful candidates
G48 List of Ad. Ed. administrators by school
Field Superintendent
Day school principals
A

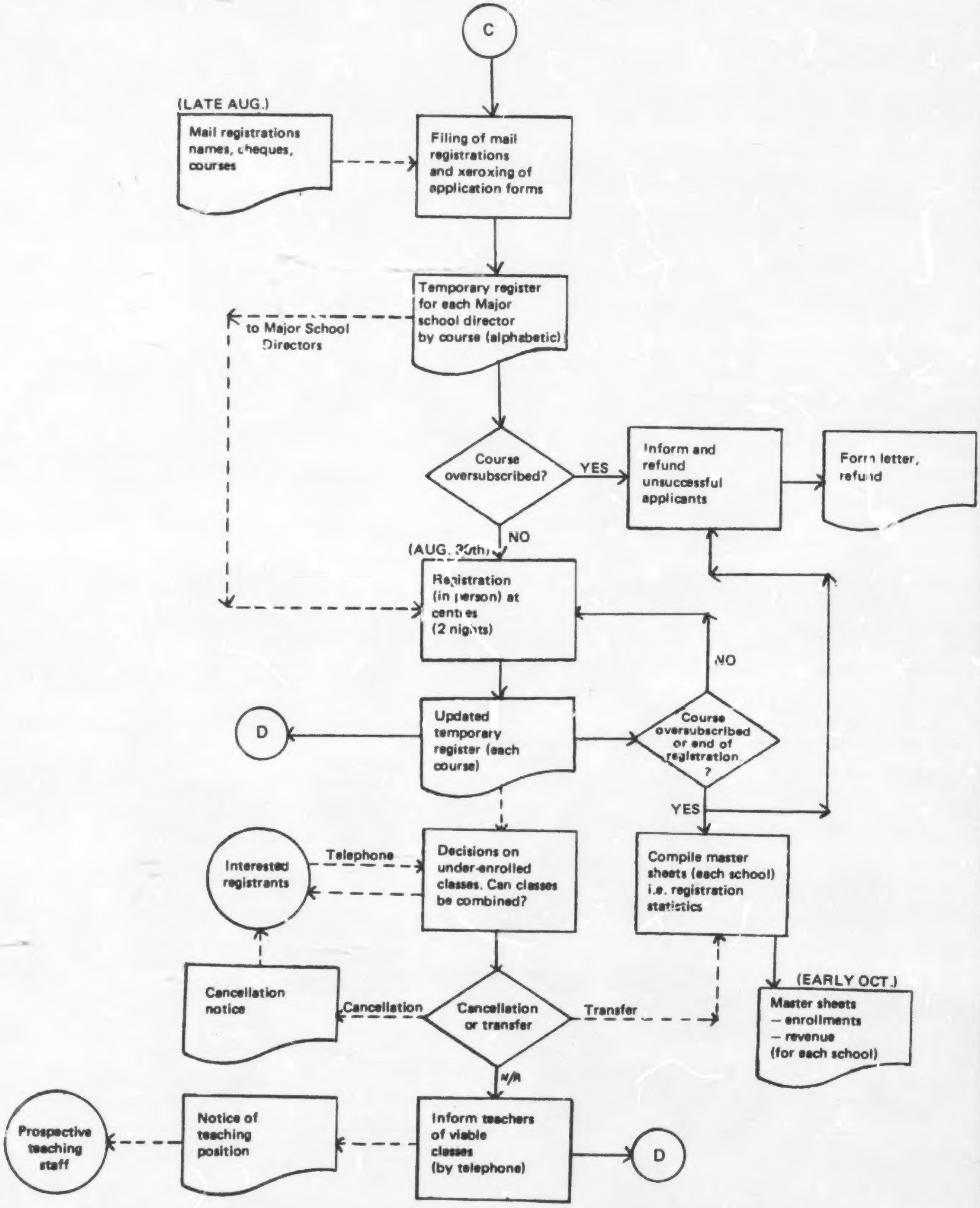
11.1.2 CONTINUING EDUCATION: Adult Education — Brochure Preparation


A
(EARLY MAR.)
Meetings with administrators
– admin. instruc.
– introduce night school assistants
– procedures for choosing teachers
– procedures for registration
Report to board (previous year)
Previous year's brochure
Master Sheets
– class code
– subject
– teacher & tel.
– schedule
– enrollment
Ideas from other sources, e.g. conferences, other boards
Planning of "Adult Evening Courses" brochure
Plan: – course offerings
– class size
Ideas, suggestions locally generated re demand for courses, e.g. local surveys
Directors
Availability of qualified staff
Former teachers file
Establish course offerings
Availability of facilities
B
Preparation of brochure
Printers (End of June)
Brochure
Every Peel household (End of August)
C

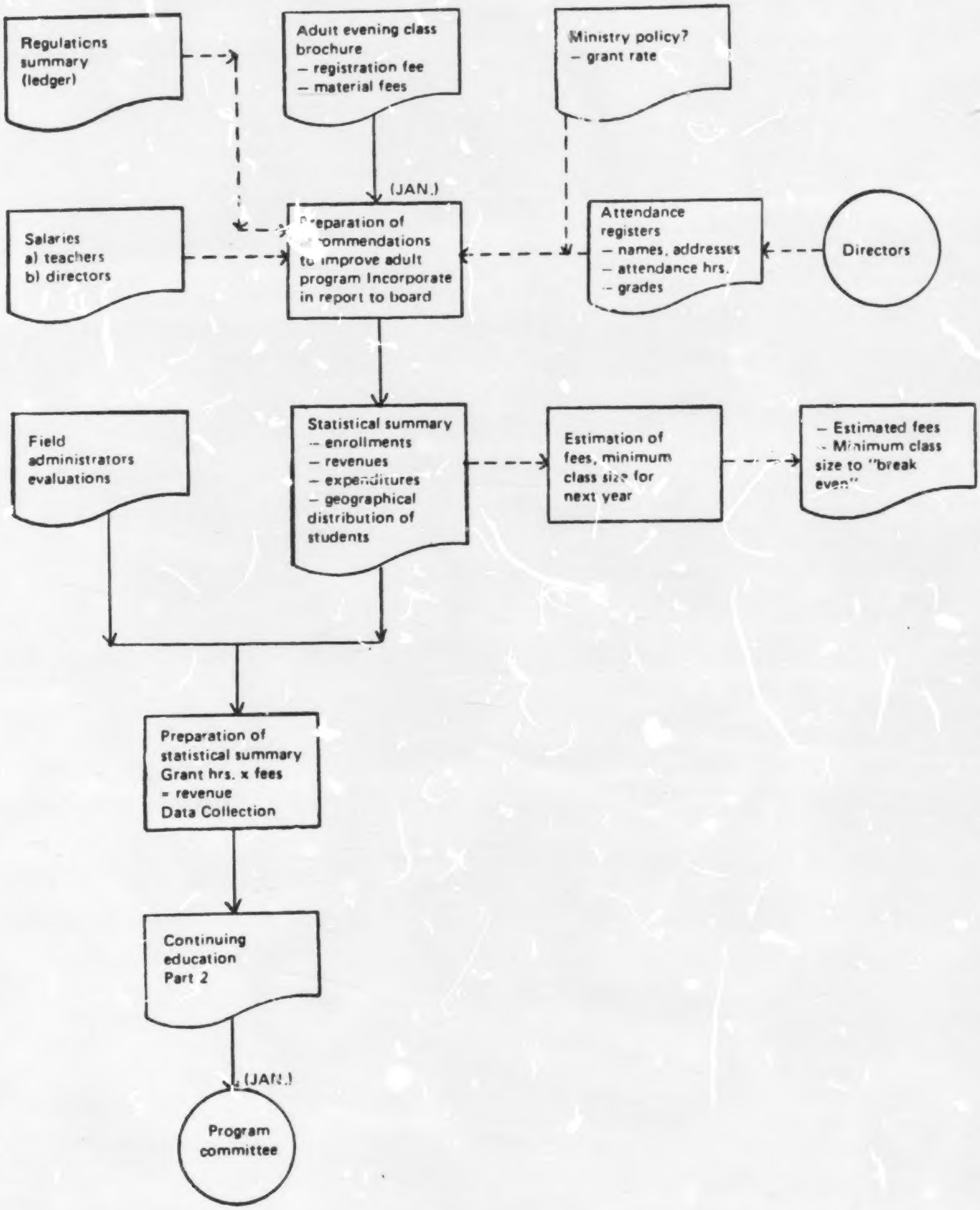
11.1.3 CONTINUING EDUCATION: Adult Education – Tentative Staff Selection


B
Prepare invitation for teachers to apply
G-memo - 53
All teaching staff and former Ad. Ed. teachers
Information on former teachers
Screening of applications
Completed application forms
Supt. of Schools Field Office
Teacher rating
Teacher application file (Acceptable former teachers & new applicants)
Central office or night school assistants
(EACH DIRECTOR)
(END of MAY)
Teachers for 'difficult' courses
Contact by telephone prospective teachers to arrange interviews
New applicants
Interview schedule
Interview all new applicants
Tentative list of teachers (for each director)
C

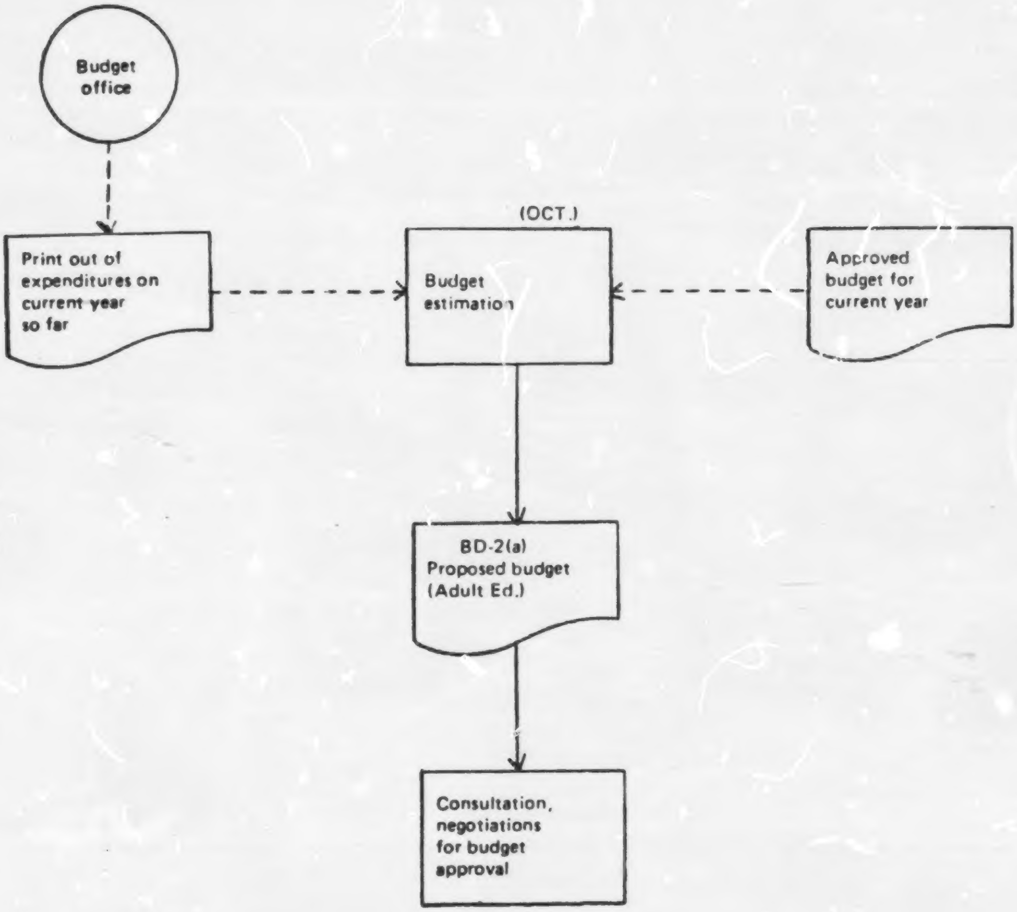
11.1.4 CONTINUING EDUCATION: Adult Education — Registration


C
(LATE AUG.)
Mail registrations names, cheques, courses
Filing of mail registrations and xeroxing of application forms
Temporary register for each Major school director by course (alphabetic)
to Major School Directors
Course oversubscribed?
YES
Inform and refund unsuccessful applicants
Form letter, refund
NO
(AUG. 30th)
Registration (in person) at centres (2 nights)
NO
D
Updated temporary register (each course)
Course oversubscribed or end of registration ?
YES
Interested registrants
Telephone
Decisions on under-enrolled classes. Can classes be combined?
Compile master sheets (each school) i.e. registration statistics
(EARLY OCT.)
Master sheets
— enrollments
— revenue
(for each school)
Cancellation notice
Cancellation
Cancellation or transfer
Transfer
N/A
Prospective teaching staff
Notice of teaching position
Inform teachers of viable classes (by telephone)
D

11.1.6 CONTINUING EDUCATION: Adult Education -- Overall Evaluation of Adult Program and Report to the Board

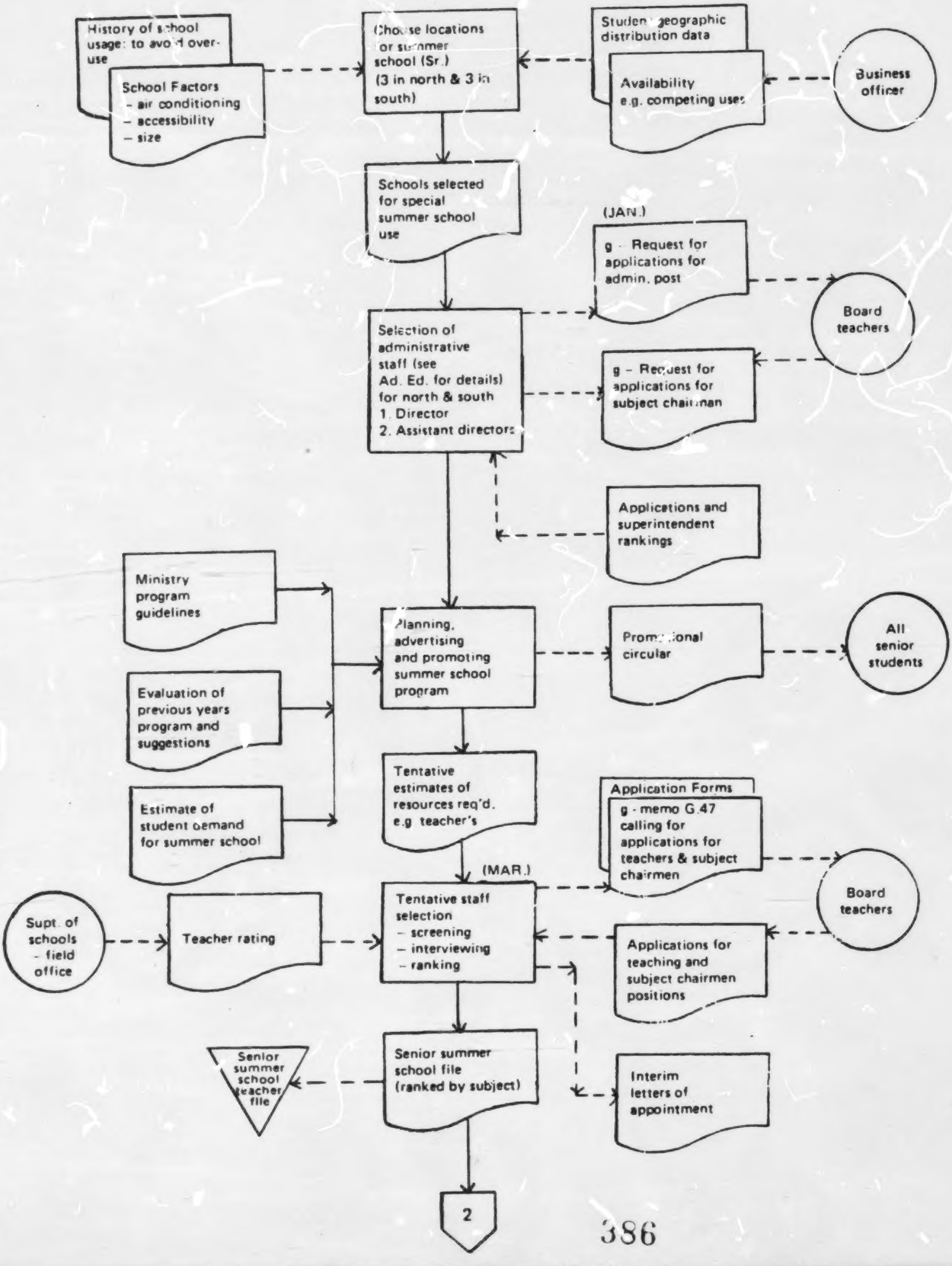

Regulations summary (ledger)
Adult evening class brochure
– registration fee
– material fees
Ministry policy?
– grant rate
(JAN.)
Salaries
a) teachers
b) directors
Preparation of recommendations to improve adult program Incorporate in report to board
Attendance registers
– names, addresses
– attendance hrs.
– grades
Directors
Field administrators evaluations
Statistical summary
– enrollments
– revenues
– expenditures
– geographical distribution of students
Estimation of fees, minimum class size for next year
– Estimated fees
– Minimum class size to "break even"
Preparation of statistical summary Grant hrs. x fees = revenue Data Collection
Continuing education Part 2
(JAN.)
Program committee

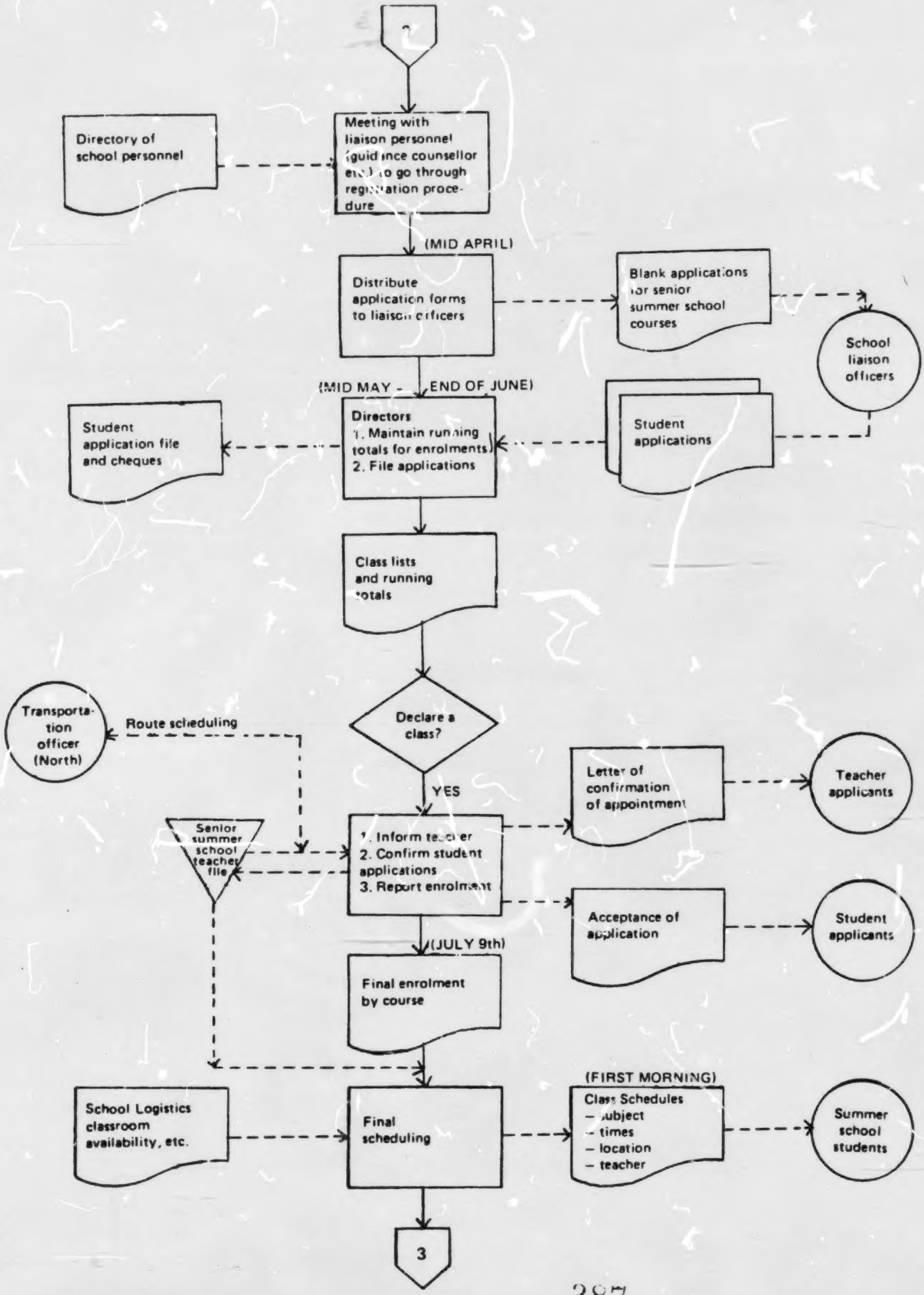
11.1.7 CONTINUING EDUCATION: Adult Education – Budget Estimates for next year


Budget office
Print out of expenditures on current year so far
(OCT.)
Budget estimation
Approved budget for current year
BD-2(a) Proposed budget (Adult Ed.)
Consultation, negotiations for budget approval

11.2.1 CONTINUING EDUCATION: Summer School – Senior

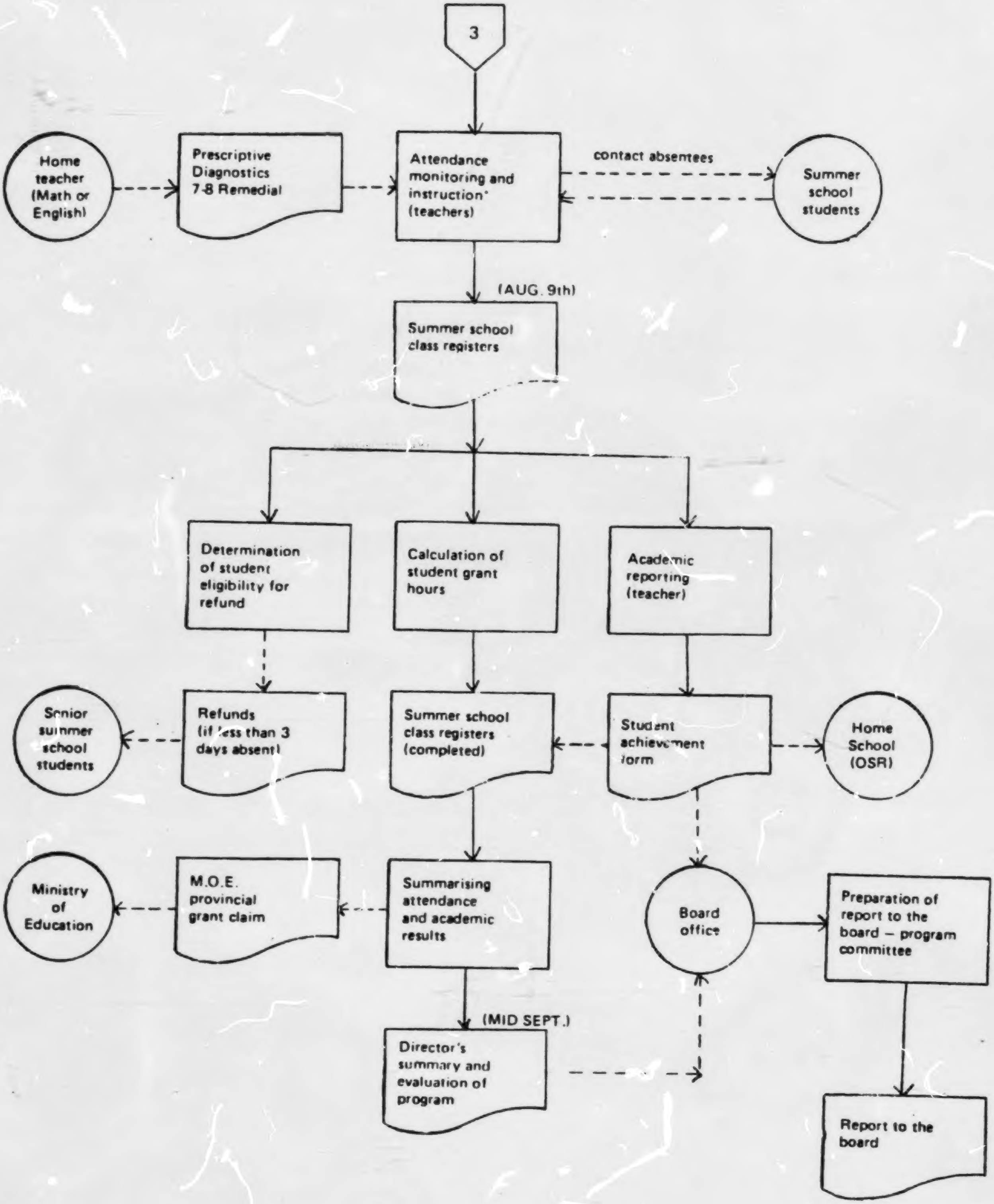
1 of 3


History of school usage: to avoid over-use
School Factors
– air conditioning
– accessibility
– size
Choose locations for summer school (Sr.) (3 in north & 3 in south)
Student geographic distribution data
Availability e.g. competing uses
Business officer
Schools selected for special summer school use
(JAN.)
g – Request for applications for admin. post
Board teachers
Selection of administrative staff (see Ad. Ed. for details) for north & south
1. Director
2. Assistant directors
g – Request for applications for subject chairman
Applications and superintendent rankings
Ministry program guidelines
Evaluation of previous years program and suggestions
Estimate of student demand for summer school
Planning, advertising and promoting summer school program
Promotional circular
All senior students
Tentative estimates of resources req'd. e.g. teacher's
Application Forms
g - memo G.47 calling for applications for teachers & subject chairmen
(MAR.)
Board teachers
Supt. of schools – field office
Teacher rating
Tentative staff selection
– screening
– interviewing
– ranking
Applications for teaching and subject chairmen positions
Senior summer school file (ranked by subject)
Senior summer school teacher file
Interim letters of appointment
2


2
Directory of school personnel
Meeting with liaison personnel (guidance counsellor etc.) to go through registration procedure
(MID APRIL)
Distribute application forms to liaison officers
Blank applications for senior summer school courses
School liaison officers
(MID MAY – END OF JUNE)
Student application file and cheques
Directors
1. Maintain running totals for enrolments
2. File applications
Student applications
Class lists and running totals
Transportation officer (North)
Route scheduling
Declare a class?
YES
Letter of confirmation of appointment
Teacher applicants
Senior summer school teacher file
1. Inform teacher
2. Confirm student applications
3. Report enrolment
Acceptance of application
Student applicants
(JULY 9th)
Final enrolment by course
(FIRST MORNING)
School Logistics classroom availability, etc.
Final scheduling
Class Schedules
– subject
– times
– location
– teacher
Summer school students
3

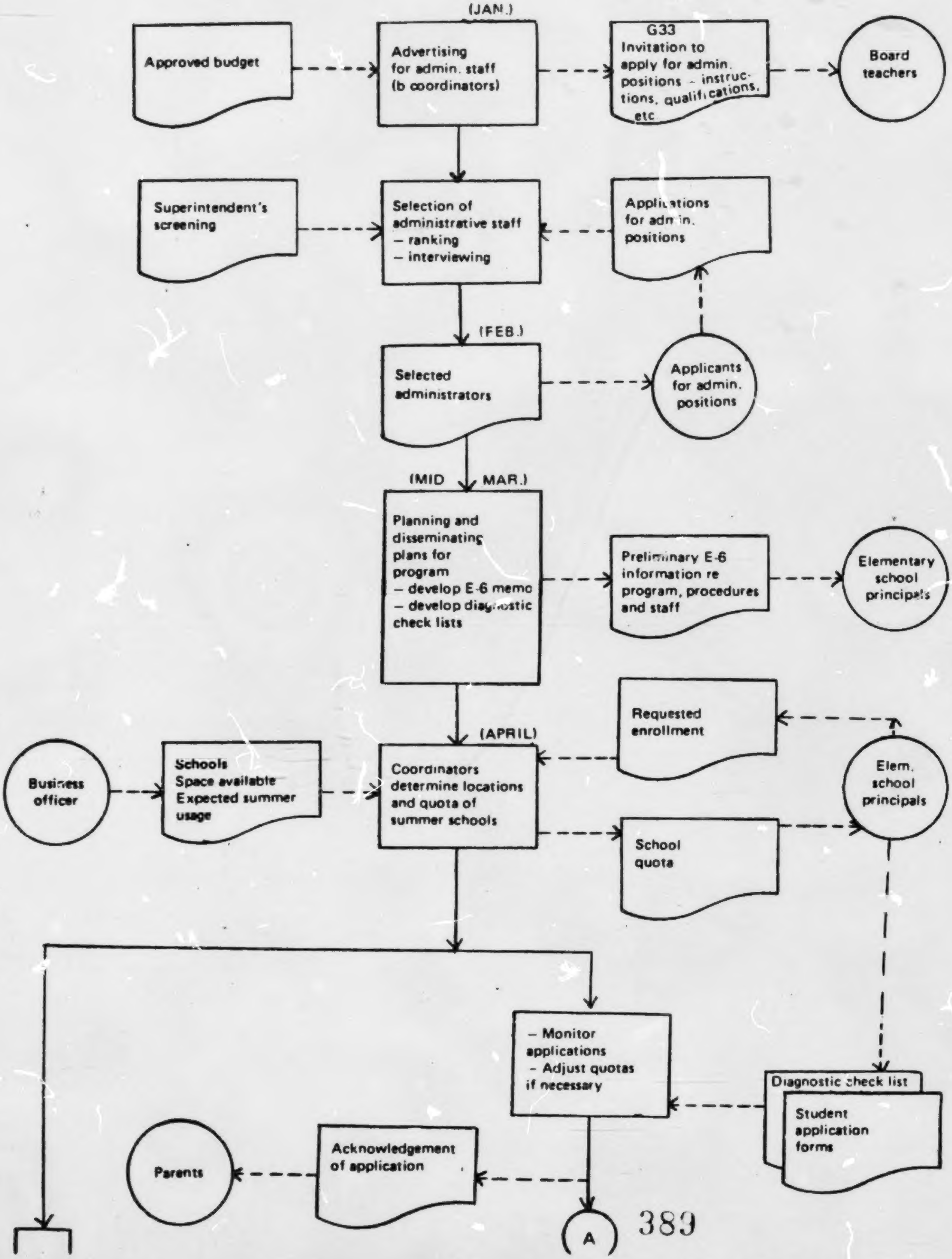
11.2.1 (cont'd)

3 of 3


3
Home teacher (Math or English)
Prescriptive Diagnostics 7-8 Remedial
Attendance monitoring and instruction' (teachers)
contact absentees
Summer school students
(AUG. 9th)
Summer school class registers
Determination of student eligibility for refund
Calculation of student grant hours
Academic reporting (teacher)
Senior summer school students
Refunds (if less than 3 days absent)
Summer school class registers (completed)
Student achievement form
Home School (OSR)
Ministry of Education
M.O.E. provincial grant claim
Summarising attendance and academic results
Board office
Preparation of report to the board – program committee
(MID SEPT.)
Director's summary and evaluation of program
Report to the board

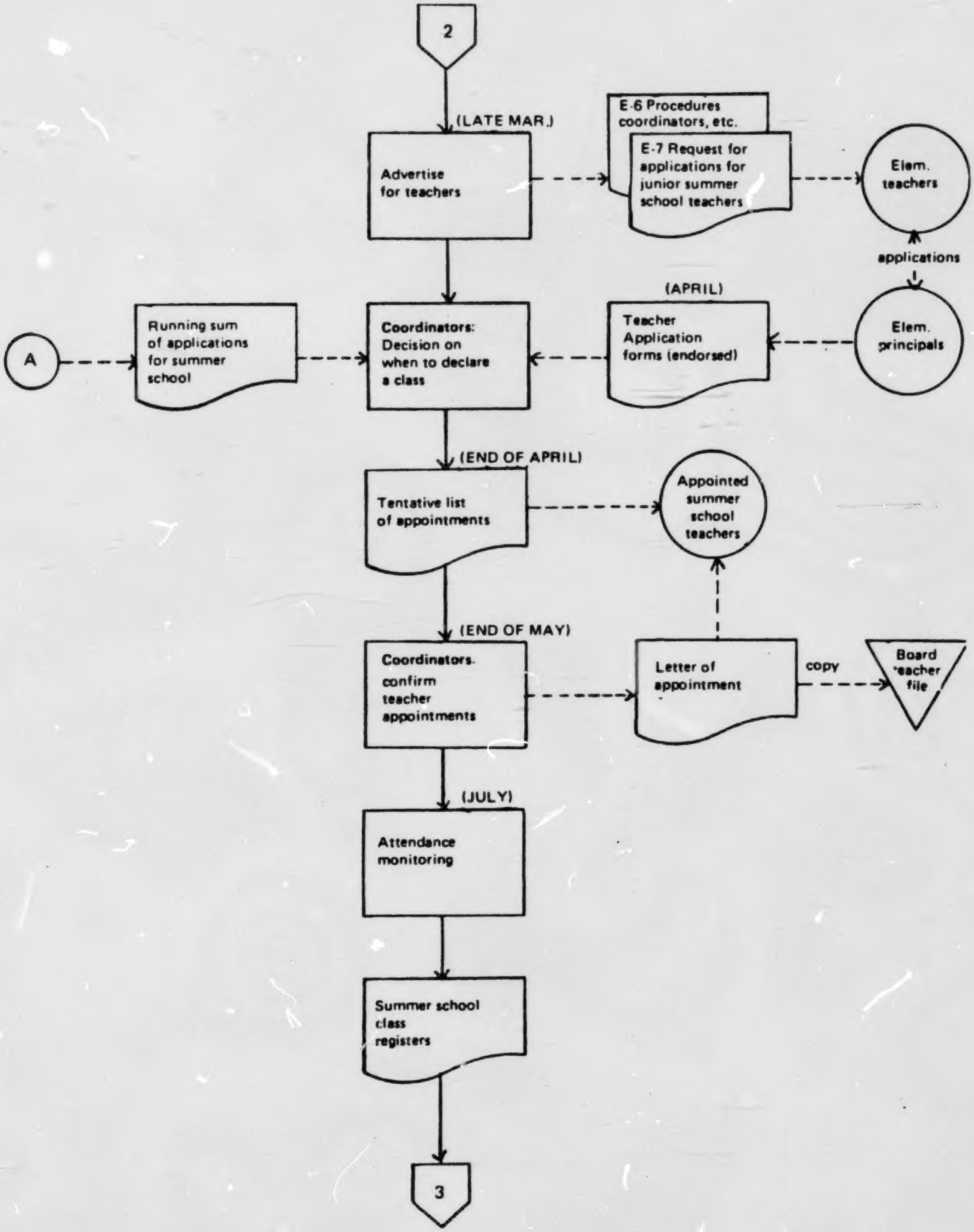
11.2.2 CONTINUING EDUCATION: Summer School — Junior

1 of 3


(JAN.)
Approved budget
Advertising for admin. staff (b coordinators)
G33 Invitation to apply for admin. positions – instructions, qualifications, etc
Board teachers
Superintendent's screening
Selection of administrative staff
– ranking
– interviewing
Applications for admin. positions
(FEB.)
Selected administrators
Applicants for admin. positions
(MID MAR.)
Planning and disseminating plans for program
– develop E-6 memo
– develop diagnostic check lists
Preliminary E-6 information re program, procedures and staff
Elementary school principals
(APRIL)
Requested enrollment
Business officer
Schools
Space available
Expected summer usage
Coordinators determine locations and quota of summer schools
Elem. school principals
School quota
– Monitor applications
– Adjust quotas if necessary
Diagnostic check list
Student application forms
Parents
Acknowledgement of application
A

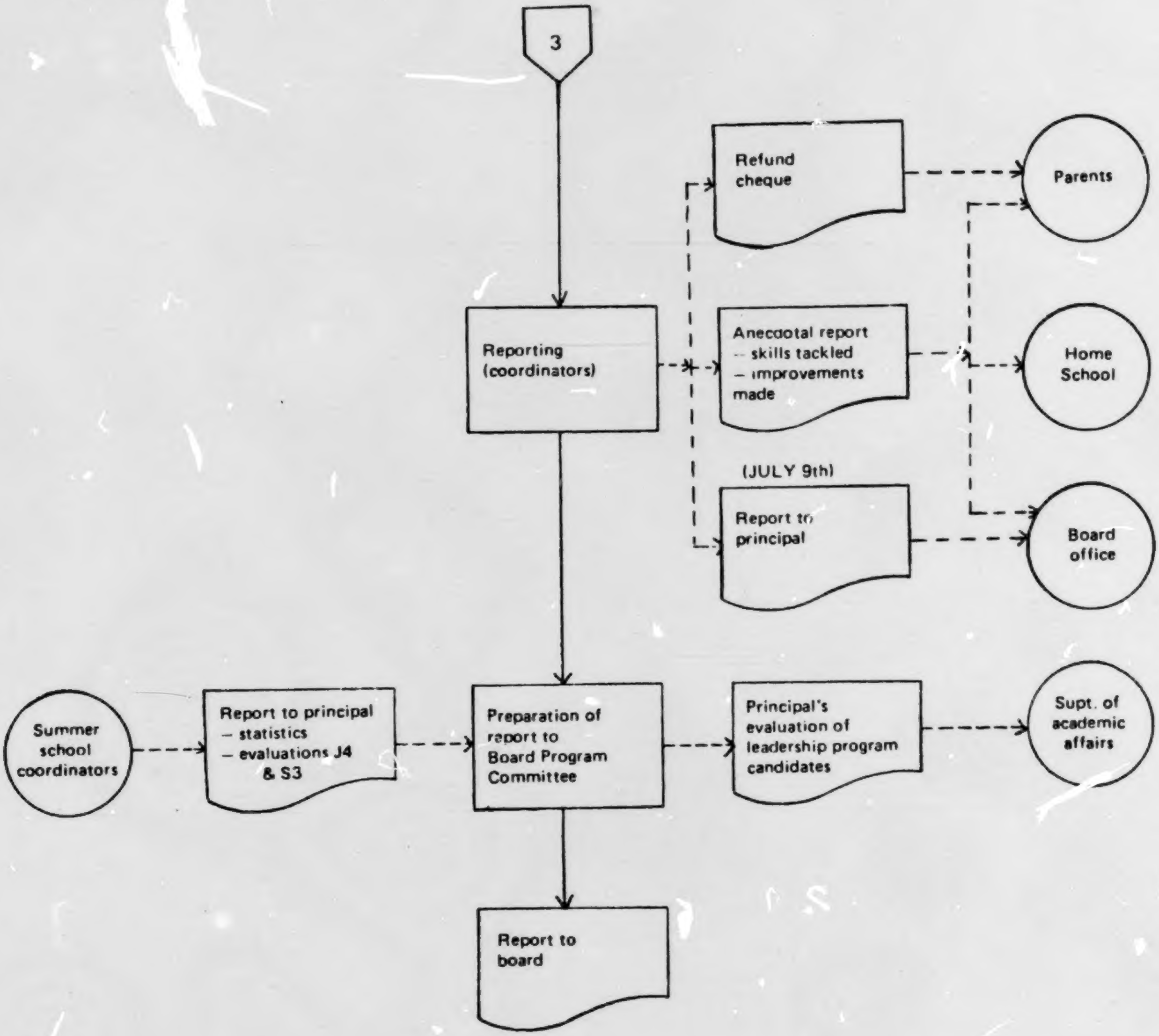
11.2.2 (cont'd)

2 of 3

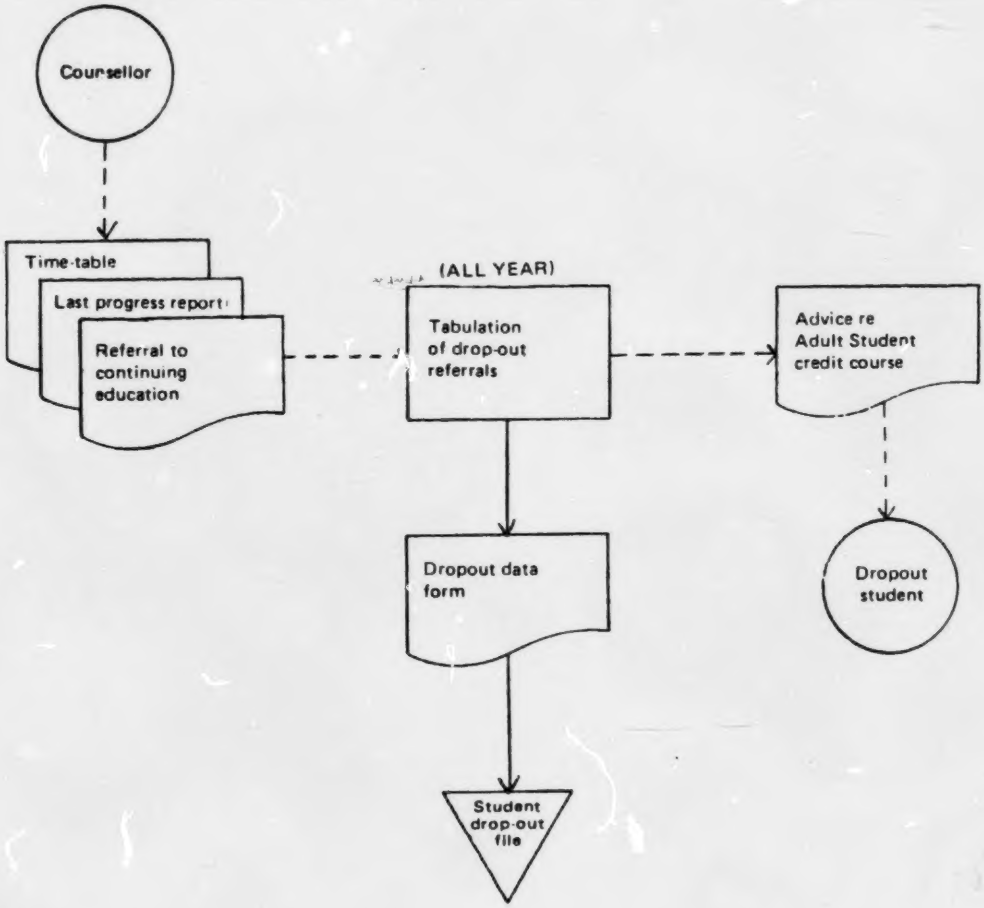

2
(LATE MAR.)
Advertise for teachers
E-6 Procedures coordinators, etc.
E-7 Request for applications for junior summer school teachers
Elem. teachers
applications
(APRIL)
A
Running sum of applications for summer school
Coordinators: Decision on when to declare a class
Teacher Application forms (endorsed)
Elem. principals
(END OF APRIL)
Tentative list of appointments
Appointed summer school teachers
(END OF MAY)
Coordinators. confirm teacher appointments
Letter of appointment
copy
Board teacher file
(JULY)
Attendance monitoring
Summer school class registers
3

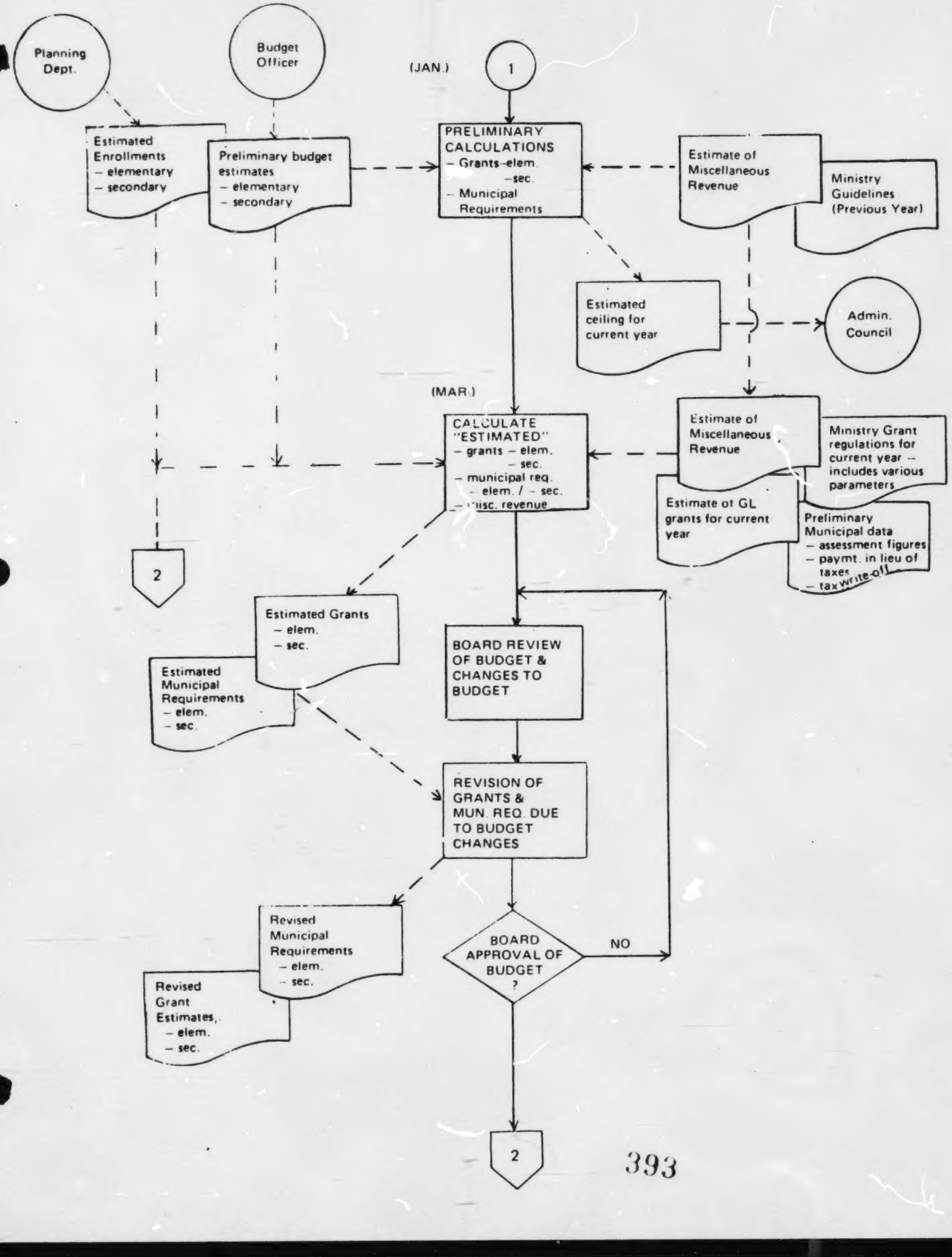
11.2.2 (cont'd)

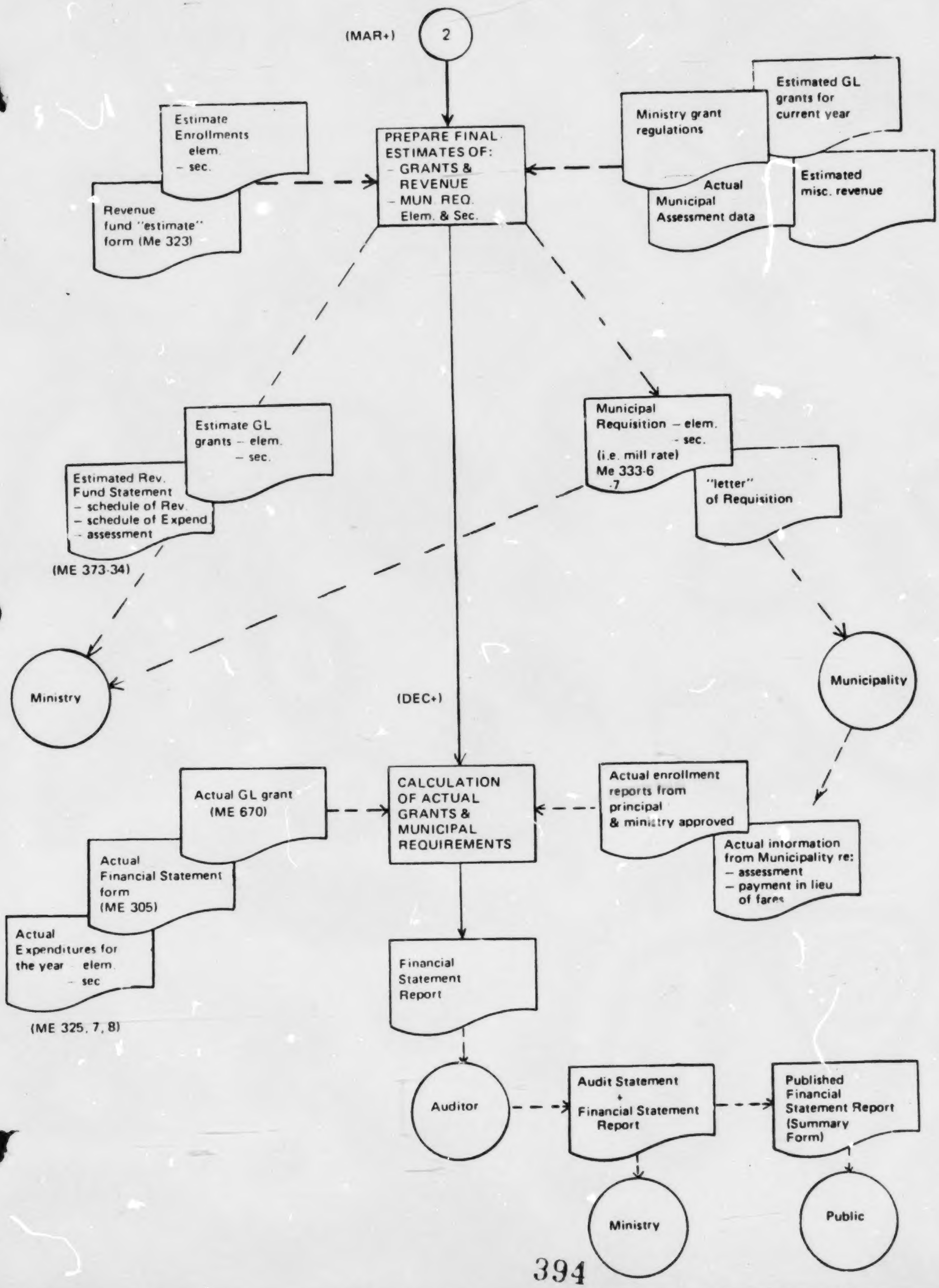
3 of 3


3
Refund cheque
Parents
Reporting (coordinators)
Anecdotal report
-- skills tackled
– improvements made
Home School
(JULY 9th)
Report to principal
Board office
Summer school coordinators
Report to principal
– statistics
– evaluations J4 & S3
Preparation of report to Board Program Committee
Principal's evaluation of leadership program candidates
Supt. of academic affairs
Report to board

11.3 CONTINUING EDUCATION: Drop-Out Referrals


Counsellor
Time-table
Last progress report
Referral to continuing education
(ALL YEAR)
Tabulation of drop-out referrals
Advice re Adult Student credit course
Dropout student
Dropout data form
Student drop-out file


Planning Dept.
Budget Officer
(JAN.)
1
Estimated Enrollments
– elementary
– secondary
Preliminary budget estimates
– elementary
– secondary
PRELIMINARY CALCULATIONS
– Grants–elem.
–sec.
– Municipal Requirements
Estimate of Miscellaneous Revenue
Ministry Guidelines (Previous Year)
Estimated ceiling for current year
Admin. Council
(MAR.)
CALCULATE "ESTIMATED"
– grants – elem.
– sec.
– municipal req.
– elem. / – sec.
– misc. revenue
Estimate of Miscellaneous Revenue
Ministry Grant regulations for current year – includes various parameters
Estimate of GL grants for current year
Preliminary Municipal data
– assessment figures
– paymt. in lieu of taxes
– tax write-off
2
Estimated Grants
– elem.
– sec.
Estimated Municipal Requirements
– elem.
– sec.
BOARD REVIEW OF BUDGET & CHANGES TO BUDGET
REVISION OF GRANTS & MUN. REQ. DUE TO BUDGET CHANGES
Revised Municipal Requirements
– elem.
– sec.
Revised Grant Estimates,
– elem.
– sec.
BOARD APPROVAL OF BUDGET ?
NO
2


(MAR+)
2
Estimate Enrollments elem. – sec.
Revenue fund "estimate" form (Me 323)
PREPARE FINAL ESTIMATES OF: – GRANTS & REVENUE – MUN. REQ. Elem. & Sec.
Ministry grant regulations
Estimated GL grants for current year
Actual Municipal Assessment data
Estimated misc. revenue
Estimate GL grants – elem. – sec.
Estimated Rev. Fund Statement – schedule of Rev. – schedule of Expend. – assessment
(ME 373-34)
Municipal Requisition – elem. - sec. (i.e. mill rate) Me 333-6 -7
"letter" of Requisition
Ministry
Municipality
(DEC+)
Actual GL grant (ME 670)
Actual Financial Statement form (ME 305)
Actual Expenditures for the year – elem. – sec
(ME 325, 7, 8)
CALCULATION OF ACTUAL GRANTS & MUNICIPAL REQUIREMENTS
Actual enrollment reports from principal & ministry approved
Actual information from Municipality re: – assessment – payment in lieu of fares
Financial Statement Report
Auditor
Audit Statement + Financial Statement Report
Published Financial Statement Report (Summary Form)
Ministry
Public